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**Social Entrepreneurship Shaped by the Life Course:
A Case Study of Older Social Entrepreneurs
in the UK**

**A thesis submitted to Middlesex University
in partial fulfilment of the requirements for the degree of
Doctor of Philosophy**

**Bianca Stumbitz MRE, MA, MSc
Middlesex University Business School**

May 2013

Declaration

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Abstract

Social entrepreneurship (SE) is a phenomenon of growing interest around the world. However, little is known regarding the characteristics of social entrepreneurs and social entrepreneurial behaviour also remains poorly understood. Although the need for research on particular groups of social entrepreneurs has been acknowledged, there currently is a dearth of literature specifically on *older* social entrepreneurs. This mixed methods study provides important insight into the diversity of social entrepreneurs over 50 and their SE activities, taking into consideration the different ways in which individual experiences are embedded in social, cultural and educational/professional backgrounds.

The focus on older people in this research has also brought to light how individual pathways into SE are shaped by stages and events in people's lives. The life course approach adopted reveals the complex and evolving nature of SE motivations which cannot be understood in isolation from other aspects of individuals' past, present and plans for future lives. A related key question addressed is whether social entrepreneurs become more or less risk averse with age.

The research contributes to knowledge in three main ways. First, an empirically based typology is developed which reflects the spectrum of social entrepreneurial activity. Three main types are identified ('Volunteer Activists', 'Rationalising Professionals' and 'High Aspirers') which demonstrate the diversity of (50+) social entrepreneurs beyond their demographic characteristics, i.e. including with respect to their expectations, the nature of their contributions, challenges and related support needs. Second, it demonstrates the importance of life stages for better understanding the link between (social) entrepreneurial intentions and actual behaviour, and presents a model of the role of motivations in the SE process which is integrated with a life course perspective. Third, it provides a more holistic insight into the nature of risk and its various dimensions, including financial (the main focus of the 'mainstream' literature) as well as reputational or other personal (e.g. physical) risks. It also demonstrates that individuals' risk taking propensity often changes over time and in response to changing circumstances in form of life stages.

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List of Abbreviations

AW	-	Award winner
DTI	-	Department for Trade and Industry
DWP	-	Department for Work and Pensions
EA	-	Entrepreneurial Awareness
GEM	-	Global Entrepreneurship Monitor
ONS	-	Office for National Statistics
OR	-	Opportunity Recognition
OSE	-	Older Social Entrepreneur
OTS	-	Office of the Third Sector
QoL	-	Quality of Life
SE	-	Social Entrepreneurship

1. Introduction

The government is supporting people who care about their communities and want to get involved in improving them. It believes that people understand the needs of their area best, which is why it is transferring power so people can make more decisions locally and solve their own problems to create strong, attractive and thriving neighbourhoods.

UK Government, 2013¹

Society is coming increasingly to appreciate the contribution older people can make. That's what active ageing is about – getting more out of life as you grow older, not less, whether at work, at home or in the community.

European Union, 2012²

1.1 Rationale for the Research

According to the UK government, social entrepreneurs have an important role to play in the future of society by taking greater responsibility to help address social issues (Conservatives, 2010). At the same time, demographic changes and social policy concerns have led to a debate around the potential role and level of involvement of older people in the wider economy and society (Bowling, 2005; Curran and Blackburn, 2001; Walker, 2005; Walker and Maltby, 2012); the fact that 2012 was the European Year of Active Ageing illustrates the topicality of the subject. This study aims to bring these two themes together by exploring the age dimension of social entrepreneurship (SE).

In a time of weakening welfare provision, cuts in public spending and an ageing society, SE is increasingly seen as having important potential for addressing the challenges involved. Nevertheless, there currently is a dearth of literature and empirical research specifically on *older* social entrepreneurs (OSEs³). Current knowledge is provided by some quantitative studies which give some indication of the extent of older people's participation in social entrepreneurial activity (Levie and Hart, 2011; Harding, 2006). However, despite its alleged

¹ Department for Communities and Local Government:
<https://www.gov.uk/government/topics/community-and-society> [accessed 1 May 2013].

² 2012 European Year of Active Ageing and Solidarity between Generations website (see <http://europa.eu/ey2012/>).

³ The author is aware of the danger of labelling the target group as 'old' (or negative stereotyping), a connotation which she wishes to avoid. This abbreviation will be used for the purposes of improved readability of this work only.

potential, qualitative investigations of the contributions of people aged over 50 to SE have so far been limited.

This mixed methods study aims to provide a better understanding of the scope and potential of 50+ SE in the UK, whilst also offering deeper insight into the motivations involved. The approach adopted takes into consideration the different ways in which individual experiences are embedded in social, cultural and educational/professional backgrounds. In this context, theories on 'embeddedness' (Granovetter, 1985) and 'structure and agency' (e.g. Giddens, 1984; Sarason *et al.*, 2006) will serve as a useful lens through which to research SE. In order to take account of the age-dimension, this project draws from theories in social gerontology (the sociology of ageing) covering aspects such as quality of life in old age, age identity and age as a social construct, in order to provide another lens through which to examine the issues of 'age' and 'ageing'.

The focus of this study on older people also brings to light how SE is shaped by the life course. For instance, existing literature on (social) entrepreneurship motivations tends to examine motivating factors in isolation from the wider context in which they are embedded, or at a particular point in the life of the entrepreneur, such as venture start-up (Jayawarna *et al.*, 2013). In this context, this study makes an important contribution by highlighting the significance of the life course in order to gain a deeper understanding of the complexity of social entrepreneurial motivations and how they evolve over time.

However, it has to be emphasised at this point that, rather than being exclusively focused on old age, ageing is a lifelong process which starts at birth (Riley *et al.*, 1972). Consequently, although often associated with research on older people, the process of ageing relates to the whole life course and applies to people of all ages.

The research contributes to knowledge in three main ways. First, it provides a better understanding of OSEs by empirically exploring the scope and potential of older people involved in SE in the UK. A typology of OSEs will be presented which reflects the different kinds of social entrepreneurial activity involved. Second, it will develop a model of SE motivations and the opportunity recognition and development process which is integrated with a life course perspective. Finally, it provides valuable insights into OSEs' attitudes towards risk and the influence of life stages on changing risk taking behaviour over the life course.

The following sections provide further detail on the background of the research, set out the aims and objectives of the study, and present the structure of the thesis.

1.2 Background to the Research

1.2.1 Social Entrepreneurship

Although SE has only recently become a subject of attention in academia and promoted within government policies, it is not a new phenomenon. Throughout history, social issues have been addressed by individuals such as Florence Nightingale or Mahatma Gandhi who sought to find solutions to seemingly insoluble social problems and who had a talent for seeing opportunities where others only saw barriers (Nicholls, 2006b). The term 'social entrepreneur' was only first used, however, by Chamberlain (1977) in the context of an allegedly 'new breed of socially motivated business executives' (Nicholls, 2006b).

In the past 20 years, SE has become increasingly topical in the UK, with a particular emphasis on its potential to tackle social exclusion. From the late 1990s, it has been closely associated with the policies of the New Labour Government of 1997-2010, aimed at building a 'Third Way' or bridge between the private and the public sectors (Bridge *et al.*, 2009; Amin *et al.*, 2002). It has been argued that our welfare state system is ill-equipped to deal with many of our modern social problems (Bridge *et al.*, 2009; Leadbeater, 1997; Seelos and Mair, 2005; Shaw *et al.*, 2002). However, as changes to the welfare system can be expected to be rather slow, it has been claimed that SE has an important role to play in the future of welfare and will be one of the most important sources of innovation (Leadbeater, 1997). It is suggested that it has the potential to help develop effective and efficient solutions to our most complex and pressing social issues, and that it "might be a sort of magic bullet for targeting social exclusion and reducing deprivation" (Bridge *et al.*, 2009: 16). According to the rhetoric, the potential of SE is, hence, enormous, and social entrepreneurs are often presented as 'heroes' with entrepreneurial talent (Ernst, 2012; Jones *et al.*, 2007; Seelos and Mair, 2005).

This is also reflected in the policy agenda of the current Conservative-Liberal Democratic coalition government, elected in 2010, according to which SE has an important role to play in building the so-called 'Big Society'. This concept was introduced as part of the Conservative Party's agenda to reduce the role of the state, including by moving away from 'big government' and to giving more responsibility to communities and neighbourhoods to address social issues. Social enterprises are presented as being able to provide more personalised public services to the most disadvantaged people, and to innovate more quickly and effectively than state bodies (Conservatives, 2010).

However, despite the fact that SE has been of considerable interest amongst researchers, policy makers and support organisations, and while a substantial body of literature has emerged over recent years, it remains ill-defined and there is little consensus over its conceptual boundaries (Lyon *et al.*, 2010; Nicholls, 2010a). The terms ‘social enterprise’ and ‘social entrepreneurship’ are often used interchangeably and, as Nicholls (2006a) points out, social entrepreneurs operate in an extraordinary breadth of operational contexts and organisational forms, which makes classification extremely difficult. Due to this heterogeneity, the field of SE is still poorly understood and the mission of finding a common narrative still remains unaccomplished, leaving those new to the subject with a huge variety of, sometimes misleading, definitions; some of them overlapping, some conflicting, some serving special interest or reflecting particular agendas (Bridge *et al.*, 2009), and it is unlikely that the definitional argument will be resolved in the near future.

Although the appropriateness of SE terminology for capturing the nature of the phenomenon is contested, it will be adopted in this research in response to a wide literature on the subject and ongoing debates amongst researchers, policy makers and practitioners. In the context of this study, SE is treated as a process, involving “entrepreneurial activity with a social orientation and intent”, which “can take place within or outside social enterprise” (Thompson, 2008: 153), and does not necessarily imply the need to generate earned income. Social enterprise is understood as an organisational form, often resulting from the wider process of SE, and will therefore be used as a subset of SE (Dees, 1998b). Social enterprises are a form of business organisation with primarily social (and/or sometimes environmental) objectives that are involved in some form of trading activity (Lyon and Ramsden, 2006).

Little empirical data is currently available on ‘who’ the social entrepreneurs are. As a consequence, the effectiveness of measures to support social entrepreneurs is often questionable, given that programmes and initiatives have typically been developed in the absence of detailed knowledge and understanding of the people targeted for support. Given the exploratory nature of this study, a wide definition of social entrepreneurs has been adopted, including individuals and teams who are running ventures with social/environmental aims, irrespective of whether they utilise a social enterprise form or identify themselves as ‘social entrepreneur’. The implications of adopting this inclusive approach will be discussed in Chapter 5.

Some research indicates that social entrepreneurs are a diverse group in terms of age, gender, ethnicity and social background (Levie and Hart, 2011; Harding, 2006). In order to be able to

effectively support social entrepreneurs, it is of vital importance to develop support initiatives that meet specific needs and reflect this diversity. Consequently, there is an urgent need for research on particular groups of social entrepreneurs, such as younger, older, ethnic minority and women social entrepreneurs.

This study responds to this need for research on social entrepreneurs over 50. It is undertaken in collaboration with UnLtd, a charity which supports social entrepreneurs in the UK. The focus of this study was suggested by UnLtd, following their identification of a particular research gap in relation to the 50+ age group.

The following section will provide a brief overview of the demographic context in which this study is placed.

1.2.2 The Ageing Population

Like many developed countries, the UK has an ageing population and workforce. The two key drivers of such demographic change are “the decline in fertility rates to below replacement levels and a fall in mortality” (Walker, 2005: 3). Whereas only one in seven people were aged 50 and over in 1901, by the end of the twentieth century this had increased to one in three (Curran and Blackburn, 2001) and this trend is predicted to continue (ONS, 2011b). The working age population is expected to decline gradually, while those over 65 years are projected to comprise 23% of the population by 2035. Life expectancy in the UK is higher than ever before for both men (78.1 years at birth) and women (82.1 years at birth) (ONS, 2011a). One in four children born today is expected to live to 100 years old (Eurostat, 2008).

Furthermore, the so-called ‘baby boomers’, the cohort born immediately after the Second World War, is now hitting retirement age (ONS, 2011b). Consequently, for the first time ever, there are more people in the UK aged over 65 (13.3 million) than there are children under 16 (11.5 million) (ONS, 2008⁴).

One of the most important characteristics of the older population is its gender distribution. With increasing age, the population is becoming more female. This disparity in longevity is due to the fact that, although this gap has been decreasing, female life expectancy (at birth) still exceeds that of men by 4.1 years (ONS, 2011a).

⁴ <http://www.statistics.gov.uk/cci/nugget.asp?ID=949>; published on 21 August 2008.

Furthermore, the older population is becoming increasingly diverse in terms of ethnic background. The generation of post-war migrants is now approaching retirement and it is estimated that in England by 2020, ethnic minority people will comprise 5% of the over 60s group, compared with 1.7% in 1991 (Grewal *et al.* 2004).

There is a need, however, to be aware of the constructed nature of the concept of 'old age'. There is no universally accepted definition in the UK, although the age of 50 is most frequently used as the cut off point⁵ in related literature, and also by the UK government (Kautonen *et al.*, 2008). However, the phenomenon of demographic ageing cannot be seen in the context of economic and policy concerns alone, given the tendency of such perspectives to disregard the influence of parallel transformations affecting the experience and meaning of old age as experienced by individuals. Walker (2005: 6) describes these developments as follows:

Retirement is no longer the clear entry point to 'old age' that it once was and, therefore, is anachronistic as a definition of who 'older people' are. [...] Thus the interlinked changes in age structure, health and patterns of employment are transforming the nature and experience of old age. They are posing sharp questions about both the traditional, essentially passive roles expected of older people and the extent to which policy makers and major economic and political institutions have adjusted to the fundamental implications of these socio-demographic changes.

As Curran and Blackburn (2001) point out in this context, the construction of older people in the literature is often contradictory. Some present growing old and retiring as liberating. For example, according to Scase (1999: 14), "middle age is no longer the beginning of the end but the beginning of a thirty-year period of personal employment and self-indulgence". On the other hand, others emphasise that older age groups show high proportions of people with low levels of wealth and income, and disproportionate numbers live in poverty (especially if no longer economically active) (Curran and Blackburn, 2001).

Part of the answer to the definitional question lies in recognising the great diversity amongst older people in terms of gender, race/ethnicity and socio-economic background, as well as, for example, physical fitness, psychological wellbeing, access to social support, levels of dependency, coping and adjustment abilities etc. It may be the case that a wider range of lifestyles is available to many older people today compared to previous generations, but it has to be remembered that they are not available to everyone, as "those in poor health and with low incomes, or those with caring responsibilities, all overwhelmingly women, are excluded"

⁵ In order to allow for comparisons, older will also mean 50 and over in this review, unless otherwise stated.

(Walker 2005: 6). Grewal *et al.* (2004: 739) suggest that older people from ethnic minorities face “extra dimensions of disadvantage” compared to older people from a non-minority background, although such patterns “are not uniform across ethnic minority groups”. Nevertheless, work on cultural and ethnic aspects of ageing is still in its infancy (Walker, 2009) and, given the predicted increase in the proportion of older people from ethnic minorities, there is an urgent need to include a cultural aspect in ageing research.

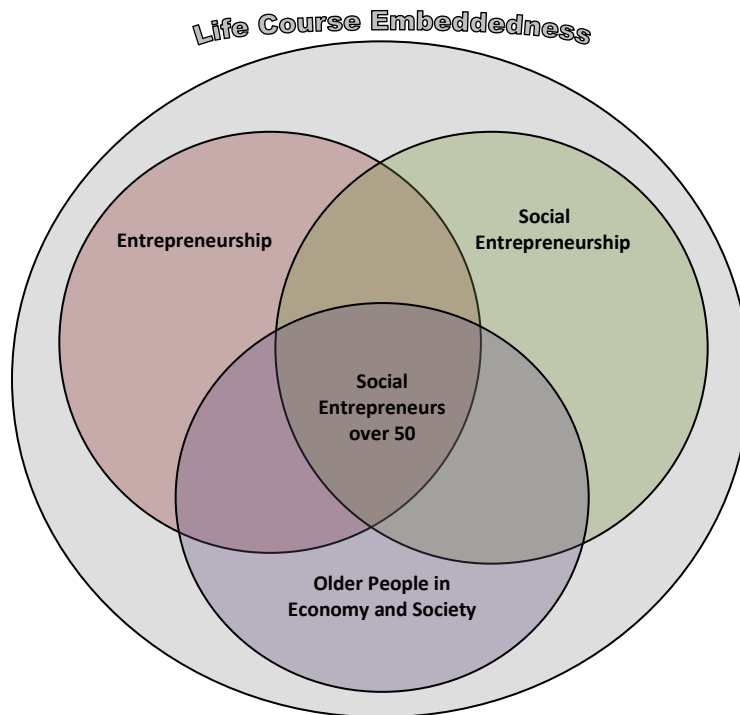
Given all the different aspects of potential relevance, it is not surprising that there is no consensus on what it means to be ‘old’. As Bowling (2005: 2-3) points out, “any categorization by age obscures the diversity of older people, physiologically, psychologically and socially”. In any case, demographic changes are affecting many aspects of life, such as the economic, medical, political and social (Benyon, 2010). A key question is therefore how policy makers and support organisations can make sure that opportunities for older people are maximised and that social exclusion is minimised (Walker, 2005).

1.3 Studying Social Entrepreneurs over 50

Current demographic changes in conjunction with the growing interest in SE, as well as the insights from the studies reviewed here, indicate an emerging research agenda and the need to further explore the age dimension of SE.

This project will link relevant literature from the fields of entrepreneurship and SE with material relating to older people. In this context, a wide range of subjects and viewpoints will be considered, drawing on literature from social and economic theory, older people in employment, those engaged in entrepreneurial activity in the private sector, as well as third sector activity. These various dimensions relevant to the study of OSEs are illustrated in Figure 1.1.

Figure 1.1: Dimensions of Researching 50+ Social Entrepreneurs



This study has been undertaken in collaboration with UnLtd⁶, a charity that supports social entrepreneurs across the UK. Although people over the age of 50 constitute over one third of the UK population (ONS, 2011a), they are under-represented amongst some groups of social entrepreneurs, including UnLtd’s award winners, individuals that have been provided with practical and financial support by the organisation. Similarly, research by Levie and Hart (2011) suggests that people over 50 are less likely to get involved in SE than most younger age groups. There is therefore a need to identify why there seem to be comparatively few OSEs and to use those findings to develop policies to attract people over 50 to SE and to provide them with tailored support. However, it may be the case that older people do not identify themselves as social entrepreneurs, and that they do not use this label or associated language, and are therefore underreported in empirical research. This study aims to shed some light on these questions.

Despite the above, some research by Levie and Hart (2011) suggests that older people are more likely to become involved in SE than in ‘mainstream’ entrepreneurship. In this context, it

⁶ About UnLtd: The charity provides “financial and non-financial start-up support to nascent social entrepreneurs and development support to a smaller number of social entrepreneurs to scale up their social venture” (Stumbitz et al., 2012: 11; see also <http://www.unltd.org.uk>).

will be of interest to explore the role that SE plays as a form of transition to, or an alternative to retirement, providing a 'middle way' between 'mainstream' entrepreneurship and voluntary work. In addition, it will be of interest to examine the extent to which the greater involvement of older people in social entrepreneurial activity can contribute to tackling the issues of an ageing society.

At the same time, current attempts at theory building in SE are still mostly of a conceptual nature and, where they are based on empirical research, they mostly draw on small scale case studies using purposive samples. As the literature review will reveal, motivations have been identified as an essential, but under-researched, factor in the (social) entrepreneurship process. This study therefore aims to contribute to theory-building by exploring social entrepreneurial motivations in the context of OSEs.

1.4 Research Aims and Objectives

The overall objective of this study is to gain a deeper understanding of social entrepreneurs over 50 and will be tackled in three main ways: 1.) It seeks to investigate who OSEs are in respect of their demographic characteristics. 2.) Given the current dearth of research specifically on OSEs, the study seeks to obtain a general understanding of their motivations, activities and experiences, as well as the contexts in which they are operating, the barriers they face and their specific needs. 3.) This study aims to contribute to theory-building in (social) entrepreneurship by building on the life course approach in order to better understand entrepreneurial motivations.

Consequently three sets of research questions have been formulated to address the aims set out above:

I. Who are 50+ Social Entrepreneurs?

What are the main demographic characteristics of older social entrepreneurs (gender, race/ethnicity, social/educational background)?

II. What is the role of people over 50 in SE and what is the nature of their social entrepreneurial activity?

What do they do?

What are their areas of activity and levels of involvement? What is the scope, scale and impact of their activities?

How do they operate?

What legal forms do they utilise? How do they fund their social entrepreneurial activities and themselves? What is the role of staff and volunteers? What is the role of teams and networks?

Self Identity as OSEs

How do they view their age and life stage in the context of their social entrepreneurial activity?

How do they define the nature of their activity (e.g. voluntary activity, community activism, as a business with social aims)?

III. What motivates OSEs and how do these motivations feed into the SE process?

How and why did participants become involved in SE?

What are the pathways into SE activity? What is the nature of the motivations driving their SE activity? What influences these motivations? Why did they choose SE over 'mainstream' entrepreneurship or volunteering?

How are their motivations related to age/life stages?

Why did participants get involved in SE at that particular time in their lives? What is the role of work/retirement decisions in the context of SE activity?

How do motivations and life stages feed into the SE process?

What is the relationship between motivations, opportunity recognition and exploitation? What is the role of life stages in the SE process?

1.5 Structure of the Thesis

The thesis is divided into eight chapters organised as follows. The first three chapters provide a review of the literature, drawing on the dimensions of studying OSEs outlined in Figure 1.1. After this, a methodology chapter presents the conceptual framework, research design, as well as approach to data collection and analysis for the two following empirical chapters. The latter will present, analyse and discuss the empirical data, and are structured around the two sets of research questions presented in the previous section. The final chapter will discuss the findings and draw conclusions from the research.

Chapter 2: Theoretical Perspectives on Entrepreneurship

The review of literature shows that current attempts at conceptualising SE activity mostly centre around comparisons with ‘mainstream’ entrepreneurial activity. Hence, in order to get a better understanding of the debate around SE and the factors which are thought to influence it, the first literature review chapter introduces the reader to the main elements of entrepreneurship theory, beginning with a brief introduction to theories on ‘embeddedness’ and the relationship between ‘structure and agency’. It will be suggested that both theories provide a useful lens through which to view (social) entrepreneurship, as they demonstrate the need to consider the relationship between society, the economy and the individual.

Chapter 3: What is Social Entrepreneurship? – Current Understanding, Issues and Policy Context

This chapter examines the development of theory building as well as the discourse in relation to SE, social enterprises and social entrepreneurs. Furthermore, it will look at how the schools of thought on entrepreneurship presented in the previous chapter have been used for theory-building in SE and assess their applicability. It also provides an overview of the current policy and practice context of SE in the UK.

Chapter 4: Older People and Ageing in Economy and Society

This chapter focuses on older people, drawing on literature related to employment, their engagement in entrepreneurial activity in the private sector, as well as in volunteering. In addition, it looks at what influences retirement decisions and discusses the potential role of SE in the transition to retirement. In order to develop a more comprehensive understanding of the older population, the issue of ‘age’ and ‘ageing’ will be discussed in the context of social gerontology, addressing the key aspects of quality of life in old age, age identity and age as a

social construct. The chapter also introduces the life course approach as another important lens through which to research OSEs.

Chapter 5: Methodology

This chapter presents the methodology adopted for this study, identified as providing the most appropriate approach for addressing the research questions. It presents the conceptual framework, and sets out the data collection and analysis process as a three-phase, sequential mixed methods study. It is argued that the research questions necessitated emphasis on an exploratory, qualitative first phase (face-to-face in-depth interviews), followed by an analysis of the UnLtd database of award winners as well as their annual survey data (quantitative). The third phase (qualitative) helped to clarify issues that remained unclear after the quantitative phase and to further examine themes that had emerged in previous phases.

Chapter 6: Social Entrepreneurship in Later Life

Drawing on both the qualitative and quantitative data sources, Chapter 6 examines the role of older people in SE activity in the UK, exploring who they are, what they do, and how they operate. A typology of social entrepreneurs is developed which reflects the variety of 50+ SE. In addition, in order to shed further light on the apparent under-representation of older people in SE, it examines the interview participants' self identity as social entrepreneurs.

Chapter 7: Embedded in the Life Course – The Development of Motivations for Social Venture Creation

Chapter 7 draws on the qualitative interview data to examine the SE process with a focus on motivations, the driving force behind SE activities. It explores pathways into SE, and factors influencing SE motivations. In this context, it demonstrates the importance of life stages and presents a model of the SE process from a life course perspective.

Chapter 8: Conclusion – Towards a Better Understanding of 50+ Social Entrepreneurs

This final chapter summarises the results of the study and discusses their implications for theory building, policy making and SE support. It outlines the limitations of the research and makes suggestions for future investigation.

2. Theoretical Perspectives on Entrepreneurship

2.1 Introduction

In order to gain an initial understanding of the debate around SE and the factors which are thought to influence it, it is necessary to go back a few steps and start by asking 'What is entrepreneurship?'. Although entrepreneurship has been studied widely, answering this question is not an easy task as there is no universally accepted definition of the term. It originates from the French word 'entreprendre', which literally means 'to undertake' (Bridge *et al.*, 2003). In this context, an entrepreneur is seen as someone "who undertakes an important task or project" and who "stimulate[s] economic progress by finding new and better ways of doing things" (Dees *et al.*, 2001: 3). The economist Richard Cantillon is said to have been the first to use the term 'entrepreneurship' in the economic literature in his 'Essai sur la Nature du Commerce en Général' which was published post-mortally in 1755 (Bridge *et al.*, 2003). The concept of entrepreneurship has evolved over the last few centuries and theorists from different disciplines have made their contribution by defining different elements of it. While recognising the breadth of thought present in economic and social theory, this chapter will draw out those elements of theories on the entrepreneurial process, which are most pertinent to this study.

Entrepreneurship is frequently equated with new venture creation or small business management and self-employment (e.g. Gibb, 1996; Bygrave and Zacharakis, 2008). However, for the purpose of this study, a definition will be adopted which does not require entrepreneurs to be the founder or manager of an organisation. An entrepreneur is someone who recognises an opportunity to create future products and services, and entrepreneurship will be viewed as the process which includes all the necessary actions to pursue or exploit such opportunities (Shane and Venkataraman, 2000).

As Chapter 3 will show, theories from the study of 'mainstream' entrepreneurship have had a considerable influence on theory-building in SE. An important aim of this chapter is therefore to prepare the ground for the next chapter on SE. The chapter provides a general understanding of theories of the entrepreneur and entrepreneurial activity, focusing on those elements which have particularly contributed to the process of theory development and

research in SE. It will give an overview of the shift in focus from the psychological traits approach (which emphasises the personality of the entrepreneur), to cognitive approaches (which examine the decision-making process by which individuals choose to act entrepreneurially). An important example for this shift in theory and practice is provided by the changing approaches to researching (social) entrepreneurial motivations which are of central concern in this study.

Furthermore, the nature of the research questions requires a perspective which takes into account the structural context of the (social) entrepreneur. It will be argued that, until recently, theories on the role and personality of the entrepreneur were based on partial theoretical approaches which over-idealise the entrepreneur as a 'heroic' individual, while also taking insufficient account of how entrepreneurs are embedded in and variously enabled and constrained by the contexts within which they operate. Theories on 'embeddedness' and the relationship between 'structure and agency' therefore provide a useful lens through which to view (social) entrepreneurship, as they demonstrate the importance of taking into consideration the relationship between the individual and wider socio-economic structures. For instance, more recent research which emphasises the role of social networks and teamwork has contributed to a more realistic presentation of entrepreneurs. Before looking at entrepreneurship theory, the following section therefore draws attention to the importance of theories that address the relationship between society, the economy and the individual in order to gain a better understanding of the entrepreneurial process.

2.2 The Relationship between Society, Economy and Individual

According to Holton (1992: 4-5), theories of economy and society "seek to explain how the economy and the wider society interact, how far economic forces determine the shape and fate of society, and how far social forces outside the economy proper in turn influence the course of economic affairs". One strand within this field is that of economic sociology, with its key concept of 'embeddedness', which will be dealt with in more detail in the following section. Theories on 'structure and agency', which also offer important insight into the relationship between human behavior and society, will be introduced in the subsequent section.

2.2.1 Entrepreneurship and ‘Embeddedness’

Although economic sociology builds on the foundational ideas of Max Weber, Karl Marx and Emile Durkheim, it was the economic anthropologist, Karl Polanyi, who paved the way for an “alternative way of conceptualising the economy” through his concept of ‘embeddedness’ (Holton, 1992: 16).

As Swedberg (1997) points out, Polanyi ‘stumbled’ across the concept in *The Great Transformation* (1944), where he only used the term ‘embedded’ twice and rather casually. Polanyi gave greater priority to this concept in *Trade and Market* (1957) more than a decade later, emphasising that economists were mistaken in centring their conceptualisation of the economy on an entirely market-based economy, thereby failing to account for how the economy is embedded in wider social relations. For Polanyi, this reductionist approach of bracketing out society and history from definitions of economics could not be maintained (Holton, 1992). Like Polanyi, Parsons and Smelser (1956) argued that “purely economic institutions rarely, if ever, exist” and that “purely economic issues can be distinguished, but only analytically by abstracting from the more complex multi-functional reality of the real world” (Holton, 1992: 22). Similarly, the classical sociologist Max Weber (1949) also did not believe in the sharp division between ‘economic’ and ‘social’ phenomena, arguing the need for a ‘social economics’. He reasoned that in order to research economic phenomena, it is necessary to analyse a wide range of social phenomena which also have potential influence on issues normally labelled as ‘economic’ (Holton, 1992).

The concept of ‘embeddedness’, however, became particularly well known after the publication of Granovetter’s article ‘Economic Action and Social Structure: The Problem of Embeddedness’ which Swedberg (1997) describes as the ‘manifesto’ of this type of sociology and the most popular article of all in *new* economic sociology (which has its roots in the early 1980s). The two key theoretical concepts in New Economic Sociology are ‘embeddedness’ and ‘the social construction of the economy’. Although the second approach originates from Berger and Luckmann’s book *The Social Construction of Reality* (1966), with respect to the ‘social construction of the economy’ it is again Granovetter who has written most about it in relation to economic sociology (Swedberg, 1997).

Granovetter (1985) questions the notion that individuals make decisions independently and outside their social context. As he points out, “the behaviour and institutions to be analysed are so constrained by ongoing relations that to construe them as independent is a grievous misunderstanding” (Granovetter (1985: 482). At the same time, he warns of ‘oversocialised’

conceptions of how society influences individual behaviour, which assume that the behaviour of individuals is predictable, based on the socialisation related to, for example, their social class. Granovetter (1985: 482) makes clear that cultural, social, structural influences are “continuously constructed and reconstructed during interaction” and, hence, part of an ongoing process which “not only shapes its members but also is shaped by them” (see ‘structure and agency’ debate below).

However, Swedberg (1997) points out the flexibility of New Economic Sociology’s two master concepts ‘embeddedness’ and ‘the social construction of the economy’, as well as the possibility to combine them with other approaches in sociology. For example, when Granovetter’s concept of embeddedness was criticised by Zukin and DiMaggio (1990) for not including a cultural perspective, a new version of the concept in the form of ‘cultural embeddedness’ was introduced. Similarly, the concept of ‘embeddedness’ is extended to Kloosterman *et al.*’s (1999) broader framework of ‘mixed embeddedness’ in the context of researching ethnic minority entrepreneurs (Barrett *et al.*, 2001), which will also be of importance for this study. Moreover, in their study of retirement behaviour, Ekerdt *et al.* (2000) refer to the ‘life course embeddedness’ of older workers’ retirement plans.

Swedberg (1997: 171) also emphasises the weakness of the flexibility of New Economic Sociology:

The end result is consequently that New Economic Sociology has succeeded in developing and flourishing in the shadow, so to speak, of two very flexible concepts which point the analysis in a certain direction – but do little else than that and basically leave the rest to the individual analyst. The notion of embeddedness has been called a ‘conceptual umbrella’, and this term also fits ‘the social construction’ idea (Portes and Sensenbrenner, 1993: 1346).

Nevertheless, ‘embeddedness’ has been identified as an important concept in the context of this study. Its flexibility is also its strength, as, in contrast to more rigid approaches, it has the capacity to take into consideration diversity of both individuals and contexts which, as will be shown in the next chapter, is of vital importance for studying social entrepreneurs and, more specifically, OSEs. Before illustrating how the concept of ‘embeddedness’ can contribute to a better understanding of the role of the entrepreneur in the entrepreneurial process, the following section will introduce other theories on the society/person interface or ‘structure and agency’.

2.2.2 'Structure and Agency' in Entrepreneurship

Arguments around 'embeddedness' are directly linked to the debate about the meta-theory of 'structure and agency' which remains one of the central issues in sociological theory. At the heart of the debate is the question if and to what extent an individual's behaviour is determined by social structure. 'Agency' refers to individual humans (in this case the entrepreneur) and their ability to act independently and exercise free choices, while 'structure' refers to factors such as social class, gender, ethnicity and culture, and the influence they have on the extent to which individuals are able to realise their (entrepreneurial) potential (Sewell, 1992). Three main theoretical approaches can be distinguished in examining the relationship between 'structure' and 'agency'. In the first, it is argued that human behaviour is mainly determined by the structure of society (holism). This school of thought is mainly represented by the work of Emile Durkheim. In the second theoretical approach, which is represented above all by Max Weber, the contrary is argued, and it is claimed that individuals construct and reconstruct society (individualism) (see Bhaskar, 1998).

The third approach, which is taken by many modern social theorists, warns of 'oversocialised' and 'undersocialised' conceptions of the connection between individuals and structure (Granovetter, 1985). It therefore offers a middle way between the other two approaches and holds that the two elements are interrelated. In this context, the critical realist Roy Bhaskar (1979: 286) explains the connection between individuals and society as follows:

Society is not the unconditioned creation of human agency (voluntarism), but neither does it exist independently of it (reification). And individual action neither completely determines (individualism) nor is completely determined by (determinism) social forms.

This third view of the interrelationship between structure and agency has been suggested as useful for researching entrepreneurship generally (Sarason, *et al.* 2006), and has also been identified as relevant by the author for this study of OSEs. Further prominent examples of this approach are provided by the work of Anthony Giddens and Margaret Archer, whose views will also be discussed briefly below.

Sarason *et al.* (2006: 287) suggest that Giddens' (1984) theory of structuration provides a useful conceptual foundation for the study of entrepreneurship:

Entrepreneurship is a social undertaking. That is, it must be carried out, and therefore understood, within the context of social systems. Structuration theory [...] helps explain how actors are the creators of social systems, yet at the same time are created by them.

Whereas holism and individualism presume the relationship between structure and agency as a 'dualism', in which the two are separate and distinct from each other, structuration theory sees them as an interactive 'duality' in which they interdepend upon each other and can, hence, not be separated from each other. Social structuring both constrains and enables entrepreneurs in the processes of discovery, evaluation, and exploitation of opportunities. Similarly, "the sources of opportunity and the structuring processes are constructed and reconstructed in the entrepreneur's actions" and are seen as an ongoing process (Sarason *et al.*, 2006: 288). It is hence argued that entrepreneurs do not exist separately from their structural, socio-economic and cultural context, and that attempts to understand them outside of this context would not fully encapsulate their nature (Sarason *et al.*, 2006).

Giddens' structuration theory has been subject to extensive critique, particularly in relation to his definition of 'duality' which leads to the conflation of structure and agency (Archer 1998). According to Mole and Mole (2010), the concept of 'duality' is a constriction, as it precludes the ability to analyse both structure and agency at the same time and, hence, the interaction between the two. Instead of using structuration theory, they suggest researching entrepreneurship through a critical realist⁷ lens as presented by Archer (1995, 1998, 1996, 2003). Although recognising the interrelationship between the two, Archer separates structure and agency (and thus reintroduces 'dualism') for analytical reasons, to allow the examination of the interaction of the two. With her critical realist approach, she offers, as Mole and Mole (2010) argue, a more complete approach to handling the nexus of structure and agency.

Furthermore, Archer (1998: 375) argues 1) "that structure necessarily pre-dates the action(s) which transform it", and 2) "that structural elaboration necessarily post-dates those actions which have transformed it". In contrast to Giddens, who claims that individuals create social systems and are at the same time created by them (Sarason, 2006), Bhaskar (1998) and Archer (1998) contend that society always pre-exists the individual. With their actions, human agents either sustain or change social structure. In their view, it can, therefore, not be said that human agents *create* social structure, as they rather *reproduce* or *transform* it. Hence, Bhaskar argues in his 'transformational model of social activity' that social practice is always *restructuration* rather than *structuration* as in Giddens' view (Archer, 1998: 360-1). Furthermore, whereas for Giddens "structures result from the present actions of agents", for Archer "structures are the result of actions of past agents" (Mole and Mole, 2010: 231). In this

⁷ Critical realism will be discussed in more depth in the methodology chapter (Section 5.2.2). Critical realism maintains that the structures identified may not be amenable to the senses (Bryman and Bell, 2003) and that "what we see is only part of the bigger picture" (Saunders *et al.*, 2007: 105).

context, both Archer and Bhaskar agree with Giddens that social structures would cease to exist without human agents reproducing or transforming them ('no people: no social structures'). However, they reject Giddens' leap to 'these structures, because of these people here present' (Archer, 1998: 370).

Blundel (2007: 58) argues that critical realism "provides a suitable vehicle for entrepreneurship research, with specific reference to qualitative approaches". However, he also draws attention to the fact that the critical realist paradigm has been a matter of sustained criticism. For instance, it has been argued that its social theoretic propositions are inconsistent and unoriginal (e.g. Baert, 1998; Parsons, 1999; Roberts, 2001) and that it tends to shift social science issues into the terrain of philosophy which is unsuited to do the job of social science (Potter, 2003). Nevertheless, Blundel provides examples of empirical work which have successfully applied a critical realist approach to entrepreneurship research (Best, 2001; Bowey and Easton, 2003; Jones, 2001; see also studies by Bøllingtoft, 2007; Leca and Naccache, 2006; Patel and Fiet, 2010).

To sum up, all of the theoretical positions discussed in this brief review take a different stance on the nature of the relationship between structure and agency, and both structuration and critical realism have been subjected to sustained criticism. However, it is important to recognise the interplay between individuals and society or, in this case, entrepreneurs and their socio-economic and cultural operational environment. Hence, there are elements in both paradigms that are useful for the examination of how social entrepreneurs' interpretations of their experience influence how they develop their ventures. Given that Archer's and Bhaskar's critical realist approach has been identified as a more complete approach to handling the nexus of structure and agency than Giddens' structuration theory, particularly in relation to its recognition of the precondition of structural contexts, it will provide the foundation of the theoretical framework for this research project (see also Section 5.2). Furthermore, in order to capture the age dimension, this study of OSEs will be informed by the critical gerontologist perspective, which has been described as critical realism through an ageing lens (Estes, 2008) (see Chapters 4 and 5).

The usefulness of theories on 'embeddedness' and 'structure and agency' in the context of the entrepreneurial process will be further examined in the subsequent sections. Particular emphasis will be given to how the influence of structure both enables and constrains the entrepreneur in discovering, assessing and exploiting opportunities. Also explored is the extent

to which entrepreneurs are able to influence some of the more 'structural' factors affecting their circumstances.

2.3 The Development of Entrepreneurship Theory and Research

This section provides an overview of the development of theoretical debates which have seen a shift from agency-centred approaches, presenting the entrepreneur as a 'heroic' individual, to more complex approaches which recognise the role of structural influences as both enabling and constraining, as discussed in relation to structure and agency above. This development also includes a move away from the emphasis on the personality of the entrepreneur towards examining the decision-making processes that lead to entrepreneurial behaviour. At the same time, research findings on the role of social networks and entrepreneurial teams have been used to deconstruct the notion of the entrepreneur as individual actor. All of the elements discussed in this section are of high importance to the study of social entrepreneurs and the insights gained will be used to inform the research approach chosen for this study.

2.3.1 Are Entrepreneurs Born or Made?

One of the main approaches to understanding the role of the entrepreneur relates to the question as to whether the likelihood of becoming or succeeding as an entrepreneur depends solely on the existence of certain inherent traits and personality characteristics (agency), or whether success can also be influenced by other factors (structure). In this context, much of the discourse on entrepreneurship is related to the question of whether entrepreneurs are born or made. Bridge *et al.* (2003: 58) summarise the debate as follows:

Many people have assumed that they are born: that is, they have certain inherent characteristics which lead them to be enterprising, and therefore if a person is not born with these characteristics they cannot be induced by subsequent upbringing, experience or training. Those who subscribe to the 'born not made' view thus assume that the internal influences on an individual's behavior [...] are the important ones, whereas those who believe that at least a certain amount of 'making' is possible also consider that the external influences can be relevant.

These approaches offer different views on the extent to which entrepreneurs are enabled or constrained by the environment in which they operate, or to what extent their ability to act is

or can be influenced by structural influences. For example, Schumpeter's entrepreneur is such a 'special person', and in his view, "only certain extraordinary people have the ability to be entrepreneurs and they bring about extraordinary events" (Deakins and Freel, 2009: 4).

According to the economist Casson (1982: 23) an entrepreneur is "someone who specializes in taking judgmental decisions about the coordination of scarce resources". As Blaug (1986: 85) explains, Casson's entrepreneur has special skills and, like Schumpeter's entrepreneur, is a special individual:

The entrepreneur is a person, not a team, committee or organisation, and he is someone who has a comparative advantage in making decisions; moreover, he reaches a different decision from other people in the face of identical circumstances either because of access to better information or because of a different interpretation of the same information. The entrepreneurial function is, in principle, performed in all societies by individuals whose judgment differs from the norm [...].

It should also be pointed out that, like Schumpeter's entrepreneur, Casson's entrepreneur has the advantage of personal wealth; hence, both these authors see lack of financial capital as a barrier to successful entrepreneurship (Deakins and Freel, 2009; Blaug, 1986).

By contrast, Kirzner (1973) argues that entrepreneurship can 'happen' to anyone and suggests that "opportunities are like dollar bills blowing around on the side-walk, waiting for an alert individual to pick them up" (Casson and Wadeson, 2007: 285). However, as Deakins and Freel (2009: 4) explain, the Schumpeterian entrepreneur "develops new technology, whereas the Kirznerian entrepreneur operates on opportunities that arise out of new technology". It could therefore be argued that Schumpeter's entrepreneur is 'more special' than Kirzner's entrepreneur and that the innovations provided by the rare Schumpeterian entrepreneur create the conditions necessary for the 'more common' Kirznerian entrepreneur to be successful.

Hence, in the context of structure and agency, two groups of entrepreneurs can be identified in the literature presented here: the agency-centred (Schumpeterian/Cassonian) entrepreneurs who create opportunities, and thereby determine and reshape structure, and the more structure-centred (Kirznerian) entrepreneurs who spot and exploit existing opportunities. Neither of the two is presented as a constrained individual. The agency-centred entrepreneur is seen as creating structure, as in Giddens' structuration theory, and the structure-centred entrepreneur uses existing structure to her or his advantage – structure is viewed as enabling. Furthermore, in both cases the entrepreneurs are 'born', not 'made'.

This study examines the role of structure and agency in the context of OSEs and explores how and to what extent their SE activities are enabled or constrained by the structural factors surrounding them. The following section will extend the discussion regarding the question of whether entrepreneurs are ‘born or made’ by taking a closer look at traits theories and their relevance to the study of OSEs.

2.3.2 Personality Theories

Supporters of the argument that entrepreneurs are born and cannot be made claim that entrepreneurs show a certain set of very specific personal traits which are shared by only a small percentage of the population. These characteristics or abilities are innate rather than the result of a favourable situation or environment, or even pure chance. Such theories have also contributed to the presentation of the entrepreneur as a ‘heroic’ individual who uses these traits to “organize the universe around him” (Ogbor, 2000: 618).

It would be beyond the scope of this chapter to discuss the traits literature in detail, due to the large number and variants of traits covered. Furthermore, there still is no consensus on what exactly the traits of the entrepreneur are. More than 40 traits (Hornaday, 1982) have been associated with the entrepreneur, and the fact that different studies have identified or used different subsets make comparisons of results difficult. The most frequently used traits to describe the entrepreneur relate to their ‘need for achievement’, ‘desire for independence’, ‘risk taking propensity’, ‘locus of control’⁸ and ‘over-optimism’ (Delmar 2006). As will be discussed in Section 2.3.3, all of these are still seen as highly relevant in the ongoing academic literature around (social) entrepreneurship. However, only one characteristic, McClelland’s (1961) ‘need for achievement’, has received consistent empirical support (see e.g. Begley and Boyd, 1988; Delmar, 1996) and has therefore become the most popular characteristic used to distinguish the entrepreneur from other people (Delmar, 2006; Bridge *et al.*, 2003; Deakins

⁸ “The concept of ‘Locus of Control’ can be traced back to Rotter’s social learning theory (Rotter, 1966) of how individuals’ perception of control affects their behaviour. The theory assumes that individuals categorise events and situations based on their underlying, shared properties. One such category concerns whether a potential end or goals can be attained through one’s actions or follows from luck or other uncontrolled external factors. A person believing that the achievement of a goal is dependent on his own behaviour or individual characteristics believes in internal control. If, on the other hand, a person believes that an achievement is the result of luck and external factors, they believe in external control. Therefore, locus of control is conceived as one determinant of the expectancy of success (Weiner, 1992)” (Delmar, 2006: 163).

and Freel, 2009). The 'need for achievement' will be discussed in more detail in the context of motivations (Section 2.3.3) below.

Apart from McClelland's theory, which includes the view that an individual's achievement motivation can be influenced through socialisation and training (Chell *et al.*, 1991), personality theories adopt an individualist, or agency-centred, stance that disregards how individual entrepreneurs are subject to more structural influences. They ignore the role of factors such as gender, age and social class, as well as (work) experience, education, training and learning in the entrepreneurial process (Deakins and Freel, 2009). Criticisms of the traits approach suggest that the nature of the entrepreneurial characteristics cannot be seen as static; they change over time and entrepreneurship is a dynamic process which is significantly influenced by the environment and culture. In addition, according to Delmar (2006), the theory and methods used in the traits approach can be seen as obsolete in relation to modern psychological research⁹. For critiques of personality and traits theories see, for example, Chell *et al.*, 1991; Delmar, 1996; Gartner, 1988; Herron and Robinson, 1993.

The ascription of a stable set of characteristics to the successful entrepreneur is also potentially alienating to many people, as there is a risk of automatically excluding everybody who does not fully meet a stereotypical set of 'entrepreneurial requirements'. Even if possible, it is questionable whether such a set list of traits is desirable as there is a risk of ending up with something like a 'tick box exercise' which could have a negative effect on the tendency of an individual to enter entrepreneurship. Individuals who clearly have entrepreneurial talent or potential might be discouraged if they feel that they do not meet the criteria of the 'ideal' entrepreneur (Ahl, 2004; Humbert, 2009; Thompson, 2002). This issue will be discussed in more detail in Chapter 3 (Section 3.3), and its role in the context of the apparent under-representation of OSEs will be demonstrated in Chapter 6 (Section 6.6).

Furthermore, even if an individual meets all of the criteria, other influences may subsume any advantage conferred by inherent traits. For example, pivotal life moments (such as the loss of a family member), sudden illness, financial crises or care responsibilities are all examples of negative influences that potentially override any advantages conferred by individual traits. On

⁹ In the traits approach, personality is only measured in one dimension. An individual's personality has now been recognised as being multi-dimensional and is mainly measured in five broad dimensions, called the 'Big Five', and include extraversion, emotional stability, agreeableness, conscientiousness and openness to experience (see Goldberg, 1993; Hogan, 1991).

the other hand, other pivotal moments, such as the recovery from a severe illness, can exert a positive influence on the individual by galvanising them into (social) entrepreneurship activity. At the same time, the success of other individuals, who do not meet the traits criteria to the same extent, may be dependent on advantages conferred by a family background of business entrepreneurship and/or their access to a strong support network. The relevance of such influences on OSEs will be discussed in Chapters 6 and 7.

In summary, there are significant limitations to traits research and, with the exception of the achievement motive, the quality of the empirical evidence to support traits theories has been poor (Bridge *et al.* 2003; Delmar, 2006). According to Deakins and Freel (2009: 23) the concern with entrepreneurial personality has considerably delayed progress in entrepreneurship research:

[It] has diverted attention away from the learning and development process in entrepreneurship and enterprise development, away from the recognition that the individual entrepreneur acquires skills and abilities, which are learned from the very process of entrepreneurship.

Given the limitations of traits approaches discussed above, it will be argued that they are unsuitable for studying OSEs, as the focus on traits fails to capture the complex realities of older people and their SE activities. The following section will therefore move away from traits theories to the more sophisticated socio-behavioural and cognitive approaches, and discuss their usefulness for researching 50+ SE. Both perspectives recognise the influence of environment and culture on individuals' capability to successfully pursue entrepreneurship.

2.3.3 Socio-Behavioural and Cognitive Approaches

Whereas traits theories are only concerned with the innate qualities which lead to individuals behaving in a particular way, more recent socio-behavioural and cognitive approaches emphasise the impact of enabling and constraining social structures on behaviour. According to this view, "the salient characteristics of the entrepreneur are primarily interactive skills (social and cognitive), most of which can be learnt" (Chell *et al.*, 1991: 46; Karataş-Özkan and Chell, 2010). In relation to the 'born or made' debate, underlying this approach is the view that a considerable degree of 'making' is possible. Consequently, the expected practical value of research in this area is to obtain an understanding of how people think and react, and to use this knowledge to educate and train potential entrepreneurs (see e.g. Gibb Dyer, 1994; Karataş-Özkan and Chell, 2010; Rae, 2005).

As pointed out in the last section, an important shortcoming of traits approaches is that they largely ignore the influence of factors such as gender, age, social class and education on individuals' propensity to start a business. Timmons *et al.* (1985; Timmons, 1989) claim that such factors play an important role in "shaping the entrepreneurial concern and the ability of the entrepreneur to be successful" (Chell *et al.*, 1991: 46). For example, a phenomenon which cannot be explained by traits theories alone is the lower participation rates in entrepreneurship of some groups, such as some ethnic minorities (Levie, 2007; Wang and Altinay, 2012). In order to be able to better understand the reasons for this, it is necessary, for example, to also look at how class is related to ethnicity, and at how social class or upbringing shape individuals' attitude towards entrepreneurship. The traits approach also ignores that some individuals are 'pushed' into self-employment, often as a 'last resort', such as after a longer period of unemployment (Parker and Rougier, 2007). Socio-behavioural approaches, on the other hand, are more sensitised to the role of such factors.

It has also been argued that cognitive approaches provide a more useful tool to research entrepreneurial behaviour than do traits theories (see Baron, 2004; Baum and Locke, 2004, Mitchell *et al.*, 2004). In cognitive theories it is argued that individuals' knowledge of the world is imperfect, as it is impossible to attain all the information 'out there'. According to Taylor (1998), the consequence is that people "have to select information and interpret it, and thus based on their experience they tend to see and know the world differently" (Delmar, 2006: 159). Decisions are then made, "not on the basis of reality, but on the basis of perceived reality", and lead to differences in behaviour (Bridge *et al.*, 2003: 75).

Cognitive models of entrepreneurial behaviour suggest that the traits used in personality theory can be broken down into broader areas which are all closely related to decision making under risk: need for achievement, risk taking, locus of control and over-optimism (Delmar, 2006). Although cognitive approaches still rely on the use of the key traits identified in personality theories, the focus is on the interaction between the characteristics of the entrepreneur and the characteristics of the situation (Baron, 1998, 2004; Carsrud and Johnson, 1989; Delmar, 2006).

In summary, both socio-behavioural and cognitive approaches have tended to move away from theories of static traits and to recognise that entrepreneurial behaviour is influenced by a complex combination of economic and social factors, as also suggested by theories of 'embeddedness' and 'structure and agency'. As Korsgaard (2011: 669) points out, "actors are not born entrepreneurs, entrepreneurial identity is created in the process of becoming an

entrepreneur". Consequently, both approaches offer elements which appear useful for the study of (social) entrepreneurs. However, one possible risk with the socio-behavioural approach is a tendency to arrive at 'oversocialised' conceptions of how society influences individual behaviour (Granovetter, 1985). At the same time, a shortcoming of cognitive decision theories is that, as in the case of traits theories, they tend to generalise the behaviour of entrepreneurs in particular situations, rather than to take into account individual differences (Delmar, 2006).

There has been a growing body of literature drawing on cognitive approaches for studying the entrepreneurial process. Although these studies have contributed to a better understanding of the entrepreneurial process, most research still struggles to fully capture its complexity (see Section 2.4). As will be argued in this thesis, the life course approach is better suited to take into account complexity and individual circumstances as influenced by factors such as gender, ethnicity, education and life stages.

2.3.4 Entrepreneurial Teams and the Networked Entrepreneur

As discussed in previous sections, personality traits only focus on individual entrepreneurial action, to the detriment of understanding how individuals operate within a wider context. Another factor which has considerably contributed to entrepreneurship research moving away from the focus on agency-centred approaches is provided by studies which emphasise the importance of social networks and entrepreneurial teams for gaining a better understanding of entrepreneurial behaviour and the entrepreneurial process (Conway and Jones, 2006; Shepherd and Krueger, 2003; West, 2007).

Network theory holds that "economic behaviour is '*embedded in networks of interpersonal relations*'" (Granovetter, 1985: 504) and emphasises "the importance of social networks and networking as an entrepreneurial tool for contributing to the establishment, development and growth of small firms" (Conway and Jones, 2006: 322).

In *Getting a Job* (1974), an early network study, Granovetter argued that how people get a job depends largely on who they know and how these connections influence the flow of information. "People with many casual contacts ('weak ties') tend to find jobs much easier than those who have only regular contacts ('strong ties'), and the basic reason is that they have access to much more information (Swedberg, 1997: 167). In his later work, Granovetter

(1992:6) also draws attention to the fact that economic theory devoted little attention to “how and why economic activities are carried out not by isolated individuals, but by groups”.

Since the publication of the above mentioned work by Granovetter (1985, 1992), numerous further studies have confirmed the relevance of networks in the context of entrepreneurial activity (see e.g. Blundel and Lyon, 2012; Casson and Della Giusta, 2007; Chell and Baines, 2000; Greve and Salaff, 2003; Lechner and Dowling, 2003; Shaw, 1998), and that entrepreneurship is ‘embedded in network structures’ (Aldrich *et al.*, 1987; Aldrich and Zimmer, 1986). Furthermore, it has been recognised that entrepreneurs’ networks and networking behaviour provide key elements in fostering the creation, development and growth of a venture (Dubini and Aldrich, 1991; Neergard, 2005).

Research findings which show the importance of networks for successful entrepreneurs have been used to deconstruct the myth of the entrepreneur as ‘heroic’ individual. As pointed out by Korsgaard (2011: 669), “the individual human actor is powerless without the agency of others. The single individual contributing all agency from start to finish in the process is an illusion, as the agency of the actor is an effect of the network in which he is embedded”. A well-known example provided by Conway and Jones (2006: 305-6) is the UK case of the entrepreneur James Dyson:

At one level Dyson illustrates the traditional viewpoint that sees entrepreneurs as ‘heroic’ individuals who achieve success as a result of their motivation, persistence and hard work. However, a closer reading of Dyson’s autobiography, *Against the Odds* (Dyson, 1997), reveals that at crucial stages in all of his business ventures he made extensive use of his wide and diverse social network. The autobiography, for example, highlights the important contribution of Dyson’s personal network to his access to finance, legal advice, social and emotional support, marketing and public relations services, as well as to talented young design engineers.

Consequently, the concept of networking helps to move away from the traditional view of entrepreneurs as isolated individualists to an image of entrepreneurship as a collective phenomenon (Johannisson, 2000; Conway and Jones, 2006; Casson and Della Giusta, 2007).

Supplementary to this perspective are important findings relating to the role of entrepreneurial teams. According to Cooper (2006: 259), “founding team members usually bring contrasting skills and expertise to the team”, in order to meet the different requirements of the venture. For example, there is the need for specialist knowledge on the product or service, as well as for administrative, financial and marketing skills and experience. In this context, entrepreneurial teams have also been found to be valuable for compensating weaknesses in individuals and,

therefore, complementing one another to provide a well functioning entity (Cooper, 2006; Roberts, 1991).

Furthermore, in his cognitive study on decision making in entrepreneurial teams, West (2007) found that venture performance depended on both differentiation and integration, and that “too much integration (highly consistent views) or too much differentiation (constantly indentifying different options and alternatives) adversely affects new venture performance” (West, 2007: 95).

Some research has confirmed a relationship between teams and networks. In her study of network roles and responsibilities in entrepreneurial founding teams, Neergard (2005: 257) found that team members differ behaviourally in their propensities for networking:

The analyses identify that team members prioritize different networking activities and that one member in particular has extensive networking activities whereas other members of the team are more limited in their networking, while some even reject the notion of networking as a useful activity.

However, the finding that the ‘lead’ entrepreneur in the team tends to have the most developed networks and takes most of the responsibility for networking has implications for the complementarity of resources discussed above. Rather than each bringing substantial networks to the team, Neergard (2005) found, in line with work by Ruef *et al.* (2003), that entrepreneurs’ networks consist of ‘trusted alters’, and that team networks are therefore often composed of overlapping associations and previous work relations.

As Gartner *et al.* (1994: 6) point out, “the ‘entrepreneur’ in entrepreneurship is more likely to be plural”, and the importance of taking into consideration the concept of networking and collective actors in SE, will be discussed in more detail in Chapter 3. Furthermore, Chapter 6 will demonstrate the importance of the role of teams and networks for 50+ SE and it will be shown that operating as a team can both be enabling and a constraint; for example, if not all team members are equally committed to the venture.

2.4 The Entrepreneur and the Entrepreneurial Process

This section focuses on presenting key elements of the entrepreneurial process which have been identified as relevant to the study of social entrepreneurs, despite the difference between ‘mainstream and social entrepreneurs. The process of entrepreneurship can be

summarised as opportunity recognition and exploitation under a certain level of risk and uncertainty (which may or may not be taken into consideration by the entrepreneur). The outcome of the process is value creation.

Furthermore, it will be demonstrated how the development from agency-centred to more complex approaches, discussed in previous sections, is also reflected in work on the role of the entrepreneur in the entrepreneurial process.

2.4.1 Value Creation through Innovation and Creativity

In the first known definition of the entrepreneur, the economist Cantillon (1755) describes the entrepreneur as “a person with the foresight and confidence to operate in conditions when costs may be known but rewards are uncertain” (Bridge *et al.* 2003: 33). At the beginning of the 19th century, the French economist and first Professor of Economics in Europe, Jean-Baptiste Say, introduced a narrower definition by describing an entrepreneur as a person who transfers economic resources from an area of lower to an area of higher productivity and return, thereby determining ‘value creation’ as one defining element of entrepreneurship. A century later, Joseph Schumpeter extended Say’s theory and provided what is often described as the classic statement of what constitutes entrepreneurship by adding that entrepreneurs ‘create value through innovation’ (Schumpeter, 1911). According to Schumpeter (1911: 174), entrepreneurs innovative “by exploiting an invention or, more generally, an untried technological possibility for producing a new source of supply of materials or a new outlet for products, by reorganizing an industry and so on”. Such innovations are the mechanisms by which economic development is achieved in capitalist economies. Schumpeter calls this dynamic process ‘creative destruction’ (Bridge *et al.*, 2003: 33):

Innovations create new demand and entrepreneurs bring the innovations to the market. This destroys existing markets and creates new ones, which will in turn be destroyed by even newer products or services.

However, although both Say and Schumpeter were concerned with the context of new business ventures, they did not see setting up a business as the essence of entrepreneurship. In their view, it is rather the role of entrepreneurs as the catalysts and creative innovators behind economic progress which is vital (Davis, 2002; Holton, 1992).

The importance of creative individuals in the entrepreneurship process has subsequently been accepted as fundamental in innovation theory (Shackle, 1970). According to this view, given

their 'special abilities', successful entrepreneurs see structure as enabling, rather than constraining or, at least, where 'ordinary' people see obstacles/barriers, entrepreneurs see these as 'challenges' to overcome. Supposedly valuable innovations are created which lead to a transformation, or restructuration, of existing economic structures. Constrained thinking or creative failure, on the other hand, slows down innovation. However, more recent thinking recognises that the same individuals can be both creative and constrained in their imagination at different points in time (Barker, 1993; Ward, *et al.*, 1995). In this context, it has also been argued that there is a need for an approach to studying this "paradox of creativity alongside constraint" which takes into consideration cognitive processes, as well as skills, motivation, personality factors, and environmental influences (Ward, 2004: 185; Sternberg and Lubart, 1991).

Nevertheless, as will be shown in Chapter 3, the ways in which value is created as well as its nature are a matter of ongoing debate in the context of SE. Furthermore, there is a need to consider the different forms or types of value, as will be discussed in relation to 50+ SE activity in Chapters 6 and 7.

2.4.2 Opportunity Recognition and Exploitation

As opportunity recognition and exploitation have been identified as key elements of the entrepreneurial process and, according to some scholars, "the basis of entrepreneurship" (Lehner and Kansikas, 2012: 26), they can be expected to be of high relevance to this study of OSEs. However, no consensus has been reached on the exact delineation of these two elements and the factors that influence them. In the literature, a number of different overlapping concepts are used to describe the process, including opportunity discovery, identification, recognition, development, and evaluation (Ardichvili *et al.*, 2003; Davidsson, 2006). All of these are used to refer to the 'ideas side of business development', whereas 'exploitation' is concerned with the realisation of the idea for a venture (Davidsson, 2006). Kirzner (1973) introduced the term 'alertness' as a precondition for entrepreneurial opportunity recognition, and Ray and Cardozo (1996) later renamed this heightened alertness to information 'entrepreneurial awareness' (Ardichvili *et al.*, 2003: 113):

They called this state entrepreneurial awareness (EA), and defined EA as 'a propensity to notice and be sensitive to information about objects, incidents, and patterns of behaviour in the environment, with special sensitivity to maker and user problems, unmet needs and interests, and novel combinations of resources.' Further, in keeping

with several authors, they claimed that personality characteristics and the environment interact to create conditions that foster higher EA (cf. Shapero, 1975; Sathe, 1989; Hisrich, 1990; Gaglio and Taub, 1992). Embedded in this line of thought is the notion that higher alertness increases the likelihood of an opportunity being recognized. There are, however, reports of studies that testify to the contrary.

A considerable body of research has examined the varied circumstances and interactive nature of influences on the opportunity recognition and exploitation process. For example, in their proposed theory of the opportunity identification process, Ardichvili *et al.* (2003: 105) identified the importance of the “entrepreneur’s personality traits such as optimism and creativity, social networks, and prior knowledge as antecedents of entrepreneurial alertness”. Furthermore, Mair and Noboa (2006) point out the influence of the entrepreneur’s background on what opportunities he or she recognises.

Nevertheless, there is little consensus on whether opportunities are already existing and waiting to be discovered (Kirzner, 1973; Alvarez and Barney, 2007), or whether they have to be created by the entrepreneur (Corner and Ho, 2010; Korsgaard, 2011). Whereas Schumpeter (1934) saw entrepreneurs as creators of opportunities, according to Kirzner (1973) and Drucker (1985), they do not necessarily cause change themselves, but exploit the opportunities provided by change. In these examples, the process of opportunity recognition and exploitation is presented as enabling. The entrepreneur creates or discovers new opportunities by exploiting the existing structure (opportunities) and, hence, contributes to the transformation of the structure (restructuration).

In relation to this, until recently, the most prevalent approach to studying entrepreneurship was the rational/economic perspective (see Foss and Klein, 2005; Sautet, 2002), which Corner and Ho (2010: 637) summarise as follows:

This approach says entrepreneurs notice or discover a tangible opportunity such as a new product or venture and follow a normative decision-making process to implement this precise idea. Normative choices involve gathering all relevant information, generating and systematically evaluating all possible alternatives, and choosing the alternative that optimizes the entrepreneur’s wealth.

More lately, the alternative effectuation approach (Sarasvathy 2001a and b; Sarasvathy and Dew, 2008; Chandler *et al.*, 2011) has come to the fore, which holds that the entrepreneur begins without an exact idea of a product or service that he or she would like to develop, but “with a set of means that can be used to address a good idea” (Corner and Ho, 2010: 638). In

order to explain the difference between the rational/economic and effectuation process, Sarasvathy (2001b: 3) uses the analogy of a chef:

A chef who is given a specific menu and has only to pick out his or her favourite recipes for the items on the menu, shop for ingredients and cook the meal in their own well-equipped kitchen is an example of causal reasoning. An example of effectual reasoning would involve a chef who is not given a menu in advance, and is escorted to a strange kitchen where he or she has to explore the cupboards for unspecified ingredients and cook a meal with them. While both causal and effectual reasoning call for domain-specific skills and training, effectual reasoning demands something more – imagination, spontaneity, risk-taking, and salesmanship.

In any case, as mentioned at the beginning of this section, given that empirical research has revealed that the process is a lot more messy and complex, often involving numerous steps between idea recognition and exploitation (Davidsson, 2006), or even an iterative process (Ardichvili, 2003), and having to overcome a number of constraints, it is often asked where or when the recognition process ends. However, another question in this context should be where or when it begins. This important issue will be discussed in more depth in the context of SE in Chapter 3, and explored in the case of OSEs in Chapter 7. It will be argued that the adoption of a life course approach can help to gain a better understanding of the nature of the opportunity recognition and exploitation process.

The following section will discuss entrepreneurial risk taking propensity, another factor identified in entrepreneurship theories as having a key influence on whether entrepreneurs decide to turn an idea for a venture into practice.

2.4.3 Risk-Taking Propensity

A further characteristic of the entrepreneur, which is already implicit in Cantillon's original conception, is the willingness to accept a certain level of personal, professional or financial risk in the pursuit of opportunity. Entrepreneurship is commonly seen as a risky activity (Casson and Della Giusta, 2007). In his book *Risk, Uncertainty, and Profit* (1921), Frank Knight made an important distinction between risk and uncertainty and argued that the objective probability of risk can be calculated, whereas uncertainty can never be known (Swedberg, 2000). As Deakins and Freel (2009: 6) explain, "risk exists when we have uncertain outcomes, but those outcomes can be predicted with a certain degree of probability"; 'true' uncertainty, however, "arises when the probability of outcomes cannot be calculated".

As Shockley (2009) points out, both Schumpeter and Kirzner separate risk and related rational economic calculation from entrepreneurial discovery. Although Kirzner (1979) allows rational decision-making to some extent, he sees entrepreneurial discovery as a creative act based on 'alertness to hitherto unnoticed opportunities' (1973). In his view, "the essence of entrepreneurship consists in seeing through the fog created by the uncertainty of the future" (Kirzner, 1997: 51, cited in Shockley, 2009: 8).

Similarly, Schumpeter's entrepreneur (1934: 85) is fully driven by his intuition or gut instinct rather than relying on knowledge and expertise:

Here the success of everything depends upon the intuition and the capacity of seeing things in a way which afterwards proves to be true, even though it cannot be established at the moment, [...] even though one can give no account of the principles by which it is done. Thorough preparatory work, and special knowledge, breadth of intellectual understanding, talent for logical analysis, may under certain circumstances be sources of failure.

Hence, neither Schumpeter nor Kirzner see risk as a constraint to the talented entrepreneur. On the contrary, they perceive the element of uncertainty as enabling. However, in this context it has to be emphasised that in both Schumpeter and Kirzner's view, it is the capitalist who is in charge of assuming the risk, not the entrepreneur (Hébert and Link, 1988). Although the functional roles of the capitalist and the entrepreneur can occasionally be embodied in the same person, according to Schumpeter (1934), the entrepreneur is never the one who carries the risk. As Blaug (1986: 85) points out, Schumpeter argues "that ownership and entrepreneurship are conceptually separate functions and that one can be an entrepreneur without being a capitalist". Nevertheless, whereas for Kirzner (1973) there is no need for the entrepreneur to own resources, Schumpeter (1934) held the view that the exploitation of opportunities requires large amounts of capital (Casson and Wadeson, 2007).

Considerable research has been undertaken on entrepreneurs' risk propensity (their tendency to take or avoid risk). Although they were long presented as high risk takers, they are now more frequently described as 'calculated' or 'moderate' risk takers (see e.g. Segal *et al.*, 2005). Schwer and Yucelt (1984) found in their study of small business entrepreneurs and managers that attitudes towards risk depended on factors such as age, motivation, education and business experience. Some have also discussed the relationship between risk and social hierarchies and class structure (see, for example, Beck, 1992; Giddens, 1991). As Deakins and Freel (2009: 18) point out, the entrepreneur can minimise risks to a certain extent, "but there

is always an element of luck, of right timing. There are always things that can go wrong – after all, the entrepreneur is dealing with uncertainty”.

However, empirical research has not led to a consensus on entrepreneurial risk propensity. For example, a number of studies have shown that there are no significant differences in risk taking and decision making in conditions of uncertainty between entrepreneur and others (e.g. Brockhaus, 1980; Masters and Meier, 1988). Shane (2003: 265) warns that such empirical findings may be confounded by self-efficacy, i.e. the entrepreneurs included in the research may have been characterised by a strong belief in their capabilities to perform the necessary tasks to make their idea a success. As he points out, several studies have shown that “firm founders objectively have a higher propensity for risk than do members of the general population, but that firm founders do not perceive their actions as risky”. Similarly, Casson and Della Giusta (2007: 223) argue that the entrepreneur’s perception of risk differs from that of other people:

It is possible that he possesses information that others do not have. Alternatively, he may be the only person to recognize the significance of an item of public information. Thus, where other people see only risk, the entrepreneur perceives an opportunity that he is sufficiently confident to exploit.

It has often been argued that women are more averse towards financial and other forms of risk than men (e.g. Brindley, 2005; Olsen and Cox, 2001; Walker and Webster, 2007). Research indicates that risk attitudes and behaviours towards entrepreneurial risk are shaped by gendered socialisation which results in women being more careful in their financial borrowing (e.g. Kepler and Shane, 2007). However, as Marlow *et al.* (2012: 27) argue, gender differences in start-up rates and growth intentions reflect women’s lower base rate of entrepreneurial capital which is constrained by factors such as previous employment, their greater domestic/caring responsibilities, a lower presence in areas traditionally associated with self-employment and a smaller number of female entrepreneurial role models, rather than risk aversion as a general trait.

As these examples show, the issue of risk propensity is very complex. Whereas some argue that risk taking propensity is a special trait of the entrepreneur, others argue that entrepreneurial risk taking is based on calculated decisions and depends on individuals’ different perceptions of risk. Nevertheless, there has been a move towards approaches which view the perceived context (knowledge and situational characteristics) as being a more

important determinant of risk taking than personality (Delmar, 2006: 162), and which treat risk perception as a cognitive phenomenon (Krueger, 2000a and b; Keh *et al.*, 2002). These findings highlight the importance of acknowledging the huge variety of circumstances and individuals involved and how these factors can result in different outcomes in terms of individuals' attitudes and behaviours with respect to risk.

However, in relation to 'mainstream' entrepreneurship, research on risk has mainly focused on financial risk. As will be shown, there is a need for a more holistic approach when examining risk in relation to SE since other dimensions such as physical, reputational or emotional risk are equally or even more important (Shaw and Carter, 2007). Attitudes towards risk and different types of risk will be further discussed in relation to social entrepreneurs in the next chapter, while participants' perceptions of risk and actual risk taking behaviour are examined in Chapter 7.

Individuals' willingness to take risk also influences motivations, another important element in the entrepreneurial process. The significance of motivations has only recently been re-discovered and, having emerged as an important theme in the study of OSEs, will be discussed in some detail in the following section.

2.5 Motivations

Broadly defined, motivations can be described as "the reasons underlying behavior" (Guay *et al.*, 2010: 712). Entrepreneurial motivations were originally included as an aspect of research on personality traits, but when attention turned away from traits towards studying the entrepreneurial process, there was also a decline of interest in motivations. However, with entrepreneurship research increasingly building on cognitive approaches, there has been a resurgence of interest in motivations. Although this study set out to examine the motivations underlying participants' social entrepreneurial activities, the crucial importance of motivations for understanding SE only became apparent whilst conducting the field work and has subsequently developed into a central concern of this thesis.

During the 1990s, entrepreneurial intentions as predictors of entrepreneurial action were researched widely (e.g. Ajzen, 1991; Krueger and Carsrud, 1993). However, as Carsrud and Brännback (2011: 11) point out, a major critique of intentions studies was that they did not provide a full understanding of the intention-action link (e.g. Bagozzi, 1992; Bird and Schjoedt,

2009; Edelman *et al.*, 2010). In the context of opportunity recognition and exploitation, the question is therefore what makes people, who have identified an opportunity for a venture start the journey of taking this insight further and develop it into a venture? According to Carsrud and Brännback (2011: 4), “the intention of the entrepreneur and the pursuit of the recognized opportunity are critical but still require motivation to drive those intentions or exploit those opportunities”. In their view, motivation is the essence of entrepreneurship.

It has been recognised that entrepreneurs are driven by multiple motivations (e.g. Birley and Westhead, 1994; Jayawarna *et al.*, 2013), and a growing body of studies have identified factors which influence motivations, such as “needs, goals, values, ideologies, personality traits, and political orientations” (Schwartz, 2011: 312). Thus far, however, no general theory has been developed in the field. Previous research has explored a vast number of sometimes overlapping motivations, and applied approaches related to, for example, personality traits, as well as social and cognitive psychology (Haynie *et al.*, 2010). This review therefore focuses on those factors and approaches that have been identified as most relevant and influential in this field, as well as those most pertinent to this study.

2.5.1 What motivates entrepreneurs?

The most common motivations identified in the entrepreneurship context (Shane *et al.*, 2003; Birley and Westhead, 1994; Delmar, 2006; Jayawarna *et al.*, 2013; Sarasvathy, 2001a), which will be covered in this review, include:

- Profit motive
- Desire for independence
- Social status
- Need for achievement
- Self-fulfilment
- Power

Profit motivation has traditionally been viewed as the main reason for becoming involved in ‘mainstream’ entrepreneurship (Schumpeter, 1934), and success is often measured in financial terms (e.g. Kalleberg and Leicht, 1991). However, as Walker and Webster (2007) point out, this view neglects the potential role of lifestyle factors or the desire to be independent. Some research has identified the two motives of achieving self-fulfilment and desire for independence as the two key motivations for starting a ‘mainstream’ venture (European Commission, 2007; Hisrich, 1985; Cassar, 2007). Consequently, as Carsrud and Brännback (2011) suggest, although still important drivers, money, power, prestige and status might not be the only entrepreneurial motivations. As will be demonstrated in Chapter 3, motivations

and aspirations are even more varied in respect to social entrepreneurs, with profit motivation playing a less important role.

Research has also shown that motivations to become involved in entrepreneurship are influenced by factors such as access to capital, career experience or perceptions of risk and opportunity (Shane *et al.*, 2003). However, as pointed out by Krueger *et al.* (2000a), empirical research which focused on situational (e.g. employment status) or individual (e.g. demographic characteristics, work experience or personality traits) factors resulted in low explanatory power and predictive validity. As a consequence, in recent years, motivation studies have tended to adopt a cognitive approach, with some re-focusing on how attitudes and values can predict intentions and behaviours (Segal *et al.* 2005).

2.5.2 Cognitive Motivation Models

According to Delmar (2006), cognitive motivation models are useful to examine why some engage in entrepreneurial activity and others not, and can be divided into two groups. The first one is concerned with how individuals' attitude to entrepreneurship influences their behaviour and is labelled 'attitude based models'. The second group is labelled 'achievement-context models' and examines how individuals behave in situations of decision-making under risk. Both approaches and their relevance to this study will now be discussed in more detail.

Attitude-Based Models

The most influential model in the attitude-based group is Ajzen's (1991) *Theory of Planned Behaviour* or adapted versions. For instance, Krueger and colleagues (Krueger and Brazeal, 1994; Krueger and Carsrud, 1993) have also emphasised the usefulness of the theory for explaining entrepreneurial behaviour, particularly business start-up. A key finding is the relationship between individuals' perceived feasibility/behavioural control or the belief that they have the abilities and knowledge required to act entrepreneurially (Delmar, 2006; Liñán, 2008; Segal *et al.*, 2005). For example, Davidsson (1995) found that women scored lower in perceived behavioural control and argues that this is one reason for women's under-representation in entrepreneurship.

Achievement-Context Models

This group includes the ‘need for achievement’ and ‘self-efficacy’ models. As pointed out in the context of personality traits, McClelland’s ‘need for achievement’ has received consistent empirical support and is still used in cognitive research on motivations today (e.g. Gorgievski *et al.*, 2011). In their meta-analysis of the relationship between the need for achievement and entrepreneurial behaviour, Collins and colleagues (2000) found this motive to be significantly related to founding a company.

A related concept is intrinsic or implicit motivation which refers to interest and enjoyment in an activity because of the pleasure derived from the activity itself (McClelland *et al.*, 1989), rather than being driven by external factors such as rewards, as in the case of extrinsic motivation (Delmar, 2006). In this context, it is argued that intrinsic motivation leads to better outcomes or performance due to its enjoyable and self-fulfilling nature (Lai, 2011). Extrinsic motivation, on the other hand, refers to external reward as a result of a particular behaviour. As Carsrud and Brännback (2011) argue, the two are not mutually exclusive and can both motivate an individual to act entrepreneurially. For instance, an entrepreneur can be intrinsically motivated to succeed and achieve a goal while, at the same time, being extrinsically driven by the desire to achieve wealth and status.

Shane *et al.* (2003: 269) also argue that entrepreneurs can be motivated by ‘egoistic passion’ or ‘selfish love of their work’, and “the process of building an organization and making it profitable”. This could also be a reason for some entrepreneurs becoming serial or portfolio entrepreneurs (Carsrud and Brännback, 2011: 16):

Once an entrepreneur has had the stimulation of starting a firm, they frequently return to that behaviour because of intrinsic motivation and the internal and external rewards they received doing that behaviour in the past. They might persist in trying for internal reasons even if they have never been rewarded externally through a successful venture.

The second achievement-related model is the concept of self-efficacy which is closely related to perceived behavioural control and locus of control¹⁰ (see also Section 2.3.2). The difference is that locus of control is a general characteristic, whereas self-efficacy differs from one situation to another. Delmar (2006: 170) explains this distinction as follows:

¹⁰ “Individuals who have an external locus of control believe that the outcome of an event is out of their control, whereas individuals with an internal locus of control believe that their personal actions directly affect the outcome of an event” (Shane *et al.*, 2003: 266).

[...] self efficacy is closely related to a situation or to an object, which means that we can have high self-efficacy in one situation and low self-efficacy in another. For example, individuals may perceive themselves as highly capable rock climbers, but with low capabilities in business matters, even if the two situations involve considerable risk-taking.

However, Shane *et al.* (2003) argue that a key problem with quantitative studies on entrepreneurial motivations is that the use of different definitions of entrepreneurship as well as methodological issues tends to lead to inconclusive results. For instance, as they point out, studies on whether or not risk taking is an entrepreneurial motivation have led to contrasting results. Shane *et al.* (2003) warn that findings regarding the risk taking propensity of entrepreneurs may be confounded with self-efficacy, with individuals found to have a high propensity of risk not necessarily themselves perceiving their behaviour as risky.

As will be discussed in Chapter 7, this study also found that participants' risk taking behaviour was not always congruent with their attitude towards risk, providing some support for Shane *et al.*'s (2003) argument. Furthermore, although all of the motives discussed above featured in the motivations of OSEs, the extent to which they played a role differed amongst participants. The qualitative interviews revealed the complexity of influencing factors in this respect which a survey would have been unable to capture.

Values and Motivations

Of particular interest to this study is the role of personal values, which have more recently been researched as motivational constructs that affect or guide entrepreneurial intentions (Bardi and Schwartz, 2003) and are clearly important in relation to SE.

Values are associated with what is important to us in our lives (Schwartz, 2007). As Rohan (2000: 262) explains, "all humans have a value system that contains a finite number of universally important value types, but differ in terms of the relative importance they place on each of these". It has been argued that values tend to become stable in early adulthood and are unlikely to change significantly after that (e.g. Bardi *et al.*, 2009; Bardi and Schwartz, 2003). The priorities placed on individual values, however, can change in response to changing life circumstances (Rohan, 2000; Schwartz, 2007).

According to Liñán (2008), the more priority individuals give to a certain value, the more this will influence their intentions to act in a manner that reflects this value. However, some have argued that values only seldom affect behaviour (e.g. Kristiansen and Hotte, 1996) and there

currently is no consistent measurement instrument. However, over the past 20 years, Schwartz (e.g. 1994; 2011; Bardi and Schwartz, 2003; Schwartz and Boehnke, 2004) has developed 10 value types (presented in Table 2.1) and which found correlations between most values and corresponding behaviours (Bardi and Schwartz, 2003).

Table 2.1: Value Types, Definitions and Representative Values

Value Type	Definition	Representative Values
Power:	Social status and prestige, control or dominance over people and resources	social power, authority, wealth
Achievement:	Personal success through demonstrating competence according to social standards	successful, capable, ambitious, influential
Hedonism:	Pleasure and sensuous gratification for oneself	pleasure, enjoying life
Stimulation:	Excitement, novelty, and challenge in life	daring, a varied life, an exciting life)
Self-direction:	Independent thought and action-choosing, creating, exploring	creativity, freedom, independent, curious, choosing own goals
Universalism:	Understanding, appreciation, tolerance and protection of the welfare of all people and of nature	broadminded, wisdom, social justice, equality, a world at peace; unity with nature, protecting the environment
Benevolence:	Preservation and enhancement of the welfare of people with whom one is in frequent personal contact	helpful, honest, forgiving, loyal, responsible
Tradition:	Respect, commitment and acceptance of the customs and ideas that traditional culture or religion provide the self	humble, accepting my portion in life, devout, respect for tradition, moderate
Conformity:	Restraint of actions, inclinations, and impulses likely to upset or harm others and violate social expectations or norms	politeness, obedient, self-discipline, honouring parents and elders)
Security:	Safety, harmony and stability of society, of relationships, and of self	family security, national security, social order, clean, reciprocation of favours

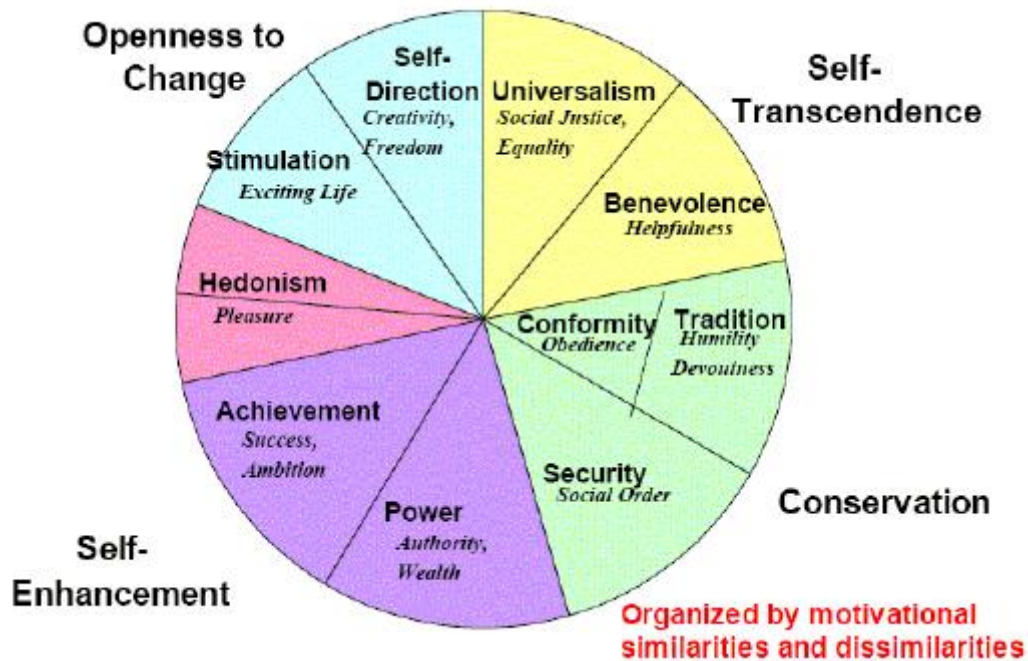
Source: adapted from Rohan, 2000; drawing on Schwartz (e.g. 1992, 1996)

According to Schwartz' value theory (e.g. Schwartz, 1992, 1994, 2007), these basic value types can be arranged in a circle (see Figure 2.1), demonstrating the dynamic relations among them. The closer any two value types in the circle, the more similar their underlying motivations. The more distant any two value types, the more opposed are the related motivations (Schwartz, 2007). These relations are summarised in two dimensions: self-enhancement (focus on individual outcomes) versus self-transcendence¹¹ (focus on social context outcomes), and

¹¹ "This dimension arrays values in terms of the extent to which they motivate people [...] to transcend selfish concerns and promote the welfare of others, close and distant, and of nature" (Schwartz and Boehnke, 2004: 236).

openness to change (focus on opportunity) versus conservation (focus on organisation) (see also Rohan, 2000).

Figure 2.1: Relations of Motivational Value Types according to Schwartz' Value Theory



Source: Schwartz (2007: 4)

It may be expected that individuals pursue values of high importance to them by behaving in ways that express them. However, Bardi and Schwartz (2003) found that value-behaviour relations are stronger in some domains than in others. Nevertheless, values were found to be weakly related to associated behaviour, particularly in those areas which have been found to be of importance in the entrepreneurship context, such as security (which relates to risk behaviour) and achievement (Begley, 1995; McClelland, 1961). Consequently, as they conclude, "it is still unclear whether values relate to behavior generally or only that some values relate to some behaviours" (Bardi and Schwartz, 2003).

Furthermore, although the values literature recognises that value priorities change dynamically, reflecting individuals' changing circumstances (Rohan, 2000; Schwartz, 2007; Schwartz and Bardi, 1997), entrepreneurship studies on motivations tend to examine value orientations at a particular stage in the entrepreneurial process, such as venture start-up

(Jayawarna *et al.*, 2013), treating values as static rather than taking into account the adaptability of value priorities.

To sum up, this section has demonstrated that, despite the move towards more complex cognitive approaches, current understanding of entrepreneurial motivations remains fragmented. One major remaining limitation of the models discussed is that they focus on examining entrepreneurs' *attitude* towards desired achievements, rather than the link between intention and *actual behaviour*. In addition, research that does focus on this gap remains suggestive and inconclusive. As Schwartz (2011: 313) points out, "developing a general theory of the structure of motivation is a worthy challenge". However, as is argued in this thesis, adopting a life course perspective to the study of motivations allows us to capture changes in value priorities over time and can shed light on this missing link between intentions to act entrepreneurially and actual behaviour.

2.5.3 Motivations and the Life Course Context

There currently is a dearth of work that examined motivations over the life course. In addition, as Jayawarna *et al.* (2013) point out, although existing literature suggests that entrepreneurs are driven by multiple motivations (e.g. Birley and Westhead, 1994) and that these are linked to environmental factors (Cassar, 2007; Taormina and Lao, 2007), it tends to examine entrepreneurial motivations in isolation from structural influences. In their quantitative study, Jayawarna *et al.* (2013) therefore draw attention to the importance of researching motivations in a wider context and argue that they develop dynamically in relation to career, household and business life courses. Their approach is informed by theories of structure and agency, recognising that "personal circumstances are constituted by the constraints and enablements that individuals face, given their position within the key social structures (Archer, 2000; 2003; Stones, 2005) of class, ethnicity, gender, age and location (Bradley, 1996)" (Jayawarna *et al.*, 2013: 4).

Their findings showed that entrepreneur motivations are formed by social structures as experienced throughout the life course. Rather than viewing motivations as static, their approach takes into account that motivations can change or that individuals may restructure the hierarchy of their motives. Drawing on Archer (2003), they argue that "a change in

circumstances produces new information which may cause realignment of motivation” (Jayawarna *et al.*, 2013: 37).

Furthermore, in an exploratory factor analysis, they found seven factors to be significant motivators for entrepreneurial activity, namely (in order of importance) achievement, flexibility and independence, materialism, power (referring to the desire to be a leader), status (relating to the need for approval and recognition), community (corresponding to a desire to contribute to the wider community), and role model (relating to the influence of role models and family traditions in encouraging entrepreneurship). Based on profiles of multiple motivations, the authors identified six clusters which they translated into entrepreneur types¹². One of these was labelled ‘social entrepreneur’ and its characteristics will be discussed in Chapter 3.

Given that their study was purely quantitative, Jayawarna *et al.* (2013) highlight the need for qualitative studies to examine motivations across the life course in more depth. As pointed out in Chapter 1, the need to understand motivations from a life course perspective is a central research question for this study of OSEs, as will be discussed in depth in Chapter 7. Although providing valuable insights into the role of structural factors on entrepreneurial motivations, Jayawarna *et al.*’s (2013) research method did not allow consideration of individual difference in how past experiences, for example in the form of pivotal moments, can trigger motivations.

The next chapter will build on the understanding drawn from the ‘mainstream’ entrepreneurship literature to consider individual motivations in the somewhat different context of *social* entrepreneurship. Chapter 3 will also undertake a more detailed exploration of motivations within the entrepreneurial process, particularly with respect to what triggers action under what conditions.

2.6 Conclusion

This chapter has provided an overview of how entrepreneurship theory and research has evolved from an initial focus on the personal traits of the entrepreneur to the adoption of more complex socio-behavioural and cognitive approaches to exploring the entrepreneurial

¹² These clusters (in order of presence in the sample) were reluctant entrepreneurs; convenience entrepreneurs; economically driven entrepreneurs; social entrepreneurs; learning and earning entrepreneurs; and prestige and control entrepreneurs.

process. It has been shown that, for a long time, attempts at theory building focused on traits approaches which have contributed to the stereotyping of the entrepreneur as a 'heroic' individual. Traits approaches have been subject to substantial criticism, particularly as they fail to recognise the general heterogeneity of entrepreneurs and ignore the extent to which individual actions are enabled and/or constrained by external influences. They were therefore identified as unsuitable for the study of OSEs.

Theories of 'embeddedness' and 'structure and agency', have been used to show that much theory on the role of the entrepreneur in the entrepreneurial process draws an unrealistic picture of the entrepreneur, being mainly focused on agent-centred views of the successful entrepreneur as individual, often with little consideration of external influences. Where structural influences are considered, they are often seen as enabling rather than constraining the talented entrepreneur. However, there has been a more recent move towards recognising the social embeddedness of the entrepreneur. Theories on the role of networks and entrepreneurial teams, for instance, discuss entrepreneurs as collective agents and related empirical evidence has been used to deconstruct the myth of the entrepreneur as heroic individual. The particular relevance of such understanding for the area of SE will be discussed in Chapter 6.

In addition, whereas traits theories are only concerned with the innate qualities which lead to individuals behaving in a particular manner, more recent socio-behavioural and cognitive approaches focus on studying how people think and react. Although these approaches appear better suited for the study of OSEs in that they do acknowledge the impact of enabling and constraining social structures on behaviour, they still tend to generalise the behaviour of entrepreneurs in particular situations and fail to take into account individual differences in context, as influenced by factors such as gender, ethnicity, education and life stages.

As has been discussed, motivations have recently been re-discovered as a vital element in the entrepreneurial process constituting the missing link between opportunity recognition and exploitation. Nevertheless, even if more recent research in the area has also shifted from traits to cognitive studies, a number of shortcomings of this work can be identified, which this thesis will address as far as possible. First, related studies focus on partial elements such as studying values to explain motivations, although they are only one influencing element. Second, similarly to traits, the values that individuals hold are treated as stable from early adulthood. Although value theory recognises that value *priorities* or hierarchies are dynamically adapted to individuals' changing life circumstances, entrepreneurship research tends to treat values as

static. Third, they often do not take into account the context in which the entrepreneur operates based on the argument that the results of prior research which did this was inconclusive. However, the fact that some recent research, which has taken structural factors into account, has provided some interesting insights into the complex nature of motivations suggests that the problems with previous studies may have been due to methodological issues. Fourth, none of the studies identified take an approach to studying motivations which examines individual differences.

To summarise, although research on entrepreneurial behaviour has increased in sophistication, with a shift from one-dimensional to more holistic approaches, the evidence base remains limited and aspects of entrepreneurial behaviour remain poorly understood. This lack of understanding can be attributed to the fact that entrepreneurship theory is, to a considerable extent, based on fragmented theoretical approaches which are poorly suited to the consideration of individual differences and therefore do not fully capture the complex reality. This study attempts to fill this gap by adopting an approach to studying OSEs which takes into consideration the diversity of this group and the different ways in which their actions are socially embedded. The methodology adopted for this project will be discussed in Chapter 5. The following chapter focuses on SE and aims at providing a good understanding of the recent policy discourse, as well as empirical research and theorising on social entrepreneurs and SE.

3. What is Social Entrepreneurship? – Current Understanding, Issues and Policy Context

3.1 Introduction

This chapter aims to provide the background knowledge on SE and social entrepreneurs required as a basis for researching OSEs. At the same time, it positions this study in the field of SE and identifies its research objectives. It will discuss SE in the context of 1.) its conceptual boundaries, 2.) the process level – social entrepreneurship and 3.) the individual level – social entrepreneurs. As set out in the introduction, social enterprise is understood here as the organisation often resulting from the SE process and will therefore be discussed as a subset of SE (Dees, 1998b).

The chapter examines how the key elements of entrepreneurship theory discussed in the previous chapter have been used to build a framework for explaining SE and social entrepreneurs, and how SE theory has undergone a similar developmental process as ‘mainstream’ entrepreneurship theory. As a consequence, SE theory is based on similarly fragmented theoretical approaches and is only just beginning to address the diversity of social entrepreneurs and their activities.

It begins with a section on the current state of SE theory and practice, providing an understanding of what SE entails, and how it has been developed, as well as the policy and practice context in the UK. This will be followed by sections on ‘who’ social entrepreneurs are and their role in the SE process. The last section will provide an overview of the current understanding of SE motivations.

3.2 The State of Social Entrepreneurship Theory and Practice

Although not a new phenomenon, the concept of SE has become increasingly topical, and started developing into an important area of academic research from the end of the 1990s (Dacin *et al.*, 2010; Fayolle and Matlay, 2010; Huybrechts and Nicholls, 2012). However, as pointed out in Chapter 1, SE remains ill-defined and there is little consensus on its conceptual

boundaries. Despite ongoing debate about the boundaries of SE activity, all definitions “agree on a central focus on social or environmental outcomes that has primacy over profit maximization” (Huybrechts and Nicholls, 2012: 34; Austin *et al.*, 2006). This section examines what is known about the diverse forms and impacts of social value creation.

In the UK, SE has been described as “a deeply political phenomenon” (Dey and Teasdale, 2012: 9; Teasdale, 2012; Huybrechts and Nicholls, 2012). This section therefore examines the current policy environment for SE in the UK in order to better understand the socio-economic and political context in which OSEs are embedded, as well as the challenges and opportunities provided.

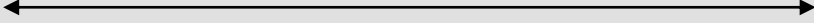
3.2.1 The Social Entrepreneurship Spectrum

Pearce’s (2003) model of the ‘Three Systems of the Economy’ is often used to give an indication of the diversity and complexity related to SE and social enterprise, and the third sector in which social entrepreneurs operate (see Appendix A). Existing definitions of SE span a wide spectrum, from purely philanthropic objectives to commercially oriented ventures. This range of activities is illustrated by Dees *et al.*’s (2001; Dees, 1998b) spectrum of SE (see Table 3.1). Whereas some social ventures are staffed entirely by volunteers, others depend largely on paid employees. Whereas those at the left end of the spectrum tend to depend on grant aid or regular fund-raising, those at the right end are more likely to be financially self-sustaining and the relationship amongst these types of financial income can change over time (Bridge *et al.*, 2009). This heterogeneity makes it difficult to arrive at a common definition for the terms ‘social entrepreneurship’ and ‘social enterprise’.

As Teasdale (2012) argues, this conceptual confusion and related academic, policy and practitioner discourses can be explained to some extent by the fact that the phenomenon of SE has evolved differently across the world (Kerlin, 2010). In mainland Europe, it has developed out of a more collective tradition, where ‘social’ initially reflected the collective ownership of the venture, i.e. mainly in form of co-operatives. In the US, on the other hand, ‘social’ refers more to “external purpose rather than internal dynamics, that is, what an organisation does rather than how it does it”, with an emphasis on market-based approaches to tackling social problems (Teasdale, 2012: 102). As will be demonstrated in Section 3.2.3, SE development in the UK has been influenced by both traditions, with emphases changing over

time. In all cases, however, it is possible to distinguish between those social ventures that prioritise social objectives, and those focused on creating financial value (Williams, 2007).

Table 3.1: The Social Entrepreneurship Spectrum

	Continuum of Options		
			
	Purely Philanthropic	Hybrids	Purely Commercial
General Motives, Methods, and Goals	Appeal to goodwill	Mixed motives	Appeal to self-interest
	Mission-driven	Balance of mission and market	Market-driven
	Social value creation	Social and economic value	Economic value creation
Key Stakeholders			
Beneficiaries	Pay nothing	Subsidized rates and/or mix of full payers and those who pay nothing	Pay full market rates
Capital	Donations and grants	Below-market capital and/or mix of full payers and those who pay nothing	Market rate capital
Workforce	Volunteers	Below-market wages and/or mix of volunteers and fully paid staff	Market rate compensation
Suppliers	Make in-kind donations	Special discounts and/or mix of in-kind and full price	Charge market prices

Source: Dees et al. (2001: 15)

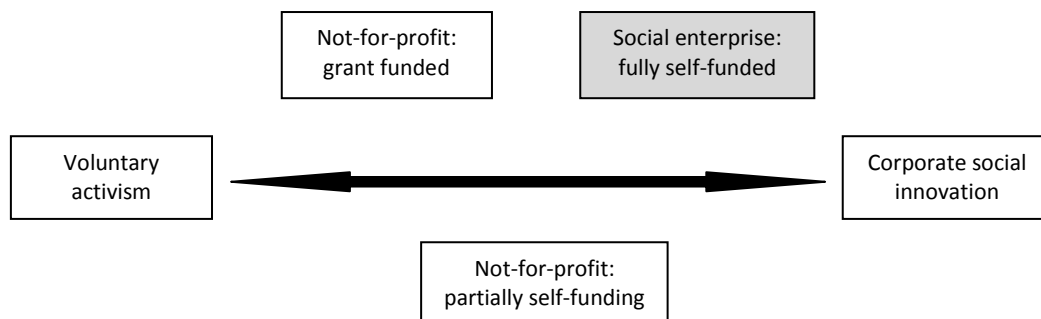
This spectrum serves as a battlefield for the definitional argument on the ‘raison d’être’ of social ventures. The debate can mainly be divided into three lines of arguments: those highlighting the importance of the ‘social’ aspects, those emphasising the ‘entrepreneurial’ aspects, and those arguing that it is all about finding the right balance between the two ends of the spectrum.

Although a useful starting point, a number of criticisms can be levelled at Dees *et al.*’s spectrum. Looking at the purely philanthropic ventures of Dees’ spectrum, the question arises in which sense those activities can be viewed as ‘social entrepreneurship’? These initiatives are often led by ‘social revolutionists’ who strongly decline the application of business strategies and objectives to social questions. Thompson and Doherty (2006: 362), argue that such organisations do not qualify as ‘true’ social enterprises and “need to be distinguished from

other socially-oriented organisations and initiatives that bring (sometimes significant) benefits to communities but which are not wanting or seeking to be ‘businesses’”.

At the other end of Dees’ spectrum, Nicholls (2006a) contends that social enterprises are a fully self-funded sub-category of the umbrella term ‘social entrepreneurship’, as illustrated in Figure 3.1. Consequently, they are a subset of SE activities “in which commercial models are used as the vehicle by which social objects are achieved” (Huybrechts and Nicholls, 2012: 33; Nicholls, 2006a).

Figure .: Funding Dimensions of Social Entrepreneurship



Source: Nicholls (2006a: 12; adapted from Dees, 1998b)

Boschee and McClurg (2003) are also highly critical of definitions that neglect what they perceive as a vital element of social enterprise – earned income. They state, for example, that “unless a non-profit organization is generating **earned** revenue from its activities, it is **not** acting in an entrepreneurial manner” (Boschee and McClurg, 2003: 2-3). They also emphasise the importance of being self-sufficient rather than merely self-sustainable. Sustainability, they explain, can be “achieved through a *combination* of philanthropy, government subsidy and earned income”, but self-sufficiency only by relying entirely on earned income (p. 5).

However, definitions of this nature appear to be rather ambitious and would fail to reflect the current spectrum of existing social enterprises. As a survey of social enterprises across the UK¹³ (IFF, 2005) has shown, around half of the ventures included in the study received grants,

¹³ The survey involved telephone interviews with a total of 8,401 organisations, of which 1,480 were longer interviews conducted with organisations meeting the survey’s definition of a social enterprise. It does not claim to describe the total population of social enterprises, as it focused on those which are registered as Companies Limited by Guarantee (CLG) or Industrial and Provident Societies (IPS) –the most commonly used legal forms.

donations and subsidies. It has to be pointed out that, in order to meet the survey's definition of a social enterprise, the organisations interviewed had to generate at least 25% of their funding from trading. In this context, Chapter 6 will discuss venture incomes of OSEs and provide interesting insights regarding the proportions of self-sustainable and self-sufficient social ventures.

3.2.2 Comparisons to 'Mainstream' Entrepreneurship

Another key theme in SE literature, which is also part of the definitional debate, is concerned with comparisons to 'mainstream' entrepreneurship. There currently is no consensus on whether SE should be regarded as a form or sub-category of 'mainstream' entrepreneurship, or whether it should be treated as a theoretical field in its own right (Dacin *et al.*, 2010; Mair and Noboa, 2006). This is partly due to the fact that the majority of SE literature is of a conceptual nature, and that empirical contributions often fail to offer formal hypotheses or use sufficiently rigorous methods (Short *et al.*, 2009). Consequently, in line with others (e.g. Dart, 2004; Dey and Steyaert, 2010), Huybrechts and Nicholls (2012: 32) argue that SE and social enterprise "remain highly contextual – and therefore contestable – notions which can be interpreted in various ways depending on the ideology and the goals of the institutions championing them".

For instance, Chell (2007) regards SE as a form of entrepreneurship and suggests including the pursuit of "the creation of 'social and economic value'" in the definition of entrepreneurship, so that it can be applied to both 'mainstream' and social enterprises. Conventional enterprises have been increasingly concerned to demonstrate that they are acting in a socially responsible manner, with a growth of practices and concepts in support of environmentally friendly and sustainable development, corporate social responsibility and business ethics. For example, Tilley and Parrish (2006) and Seelos and Mair (2005) emphasise the necessity of sustainable development¹⁴ practices in both social and economic enterprises. According to Boschee and McClurg (2003), however, social enterprises are essentially different from economic enterprises. The efforts of business enterprises to act in a socially responsible manner are only indirectly related to social problems, whereas, in the case of social enterprises, their income strategies are directly tied to their mission or their 'raison d'être'.

¹⁴ The World Commission on Environment and Development (1987) defines sustainable development as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs".

A further limitation of such debates is that the reference point is often that of 'mainstream' or economic entrepreneurship which is too often conceptualised within a discourse which equates 'economic' with 'business' and profit maximisation, rather than adopting a wider social science perspective of what 'economic' may entail. As Dorman (2000: 2) explains, "when most people hear the word 'economics', they think it has to do with the management of money". Underlying this notion is also the expectation that growth is an ultimate goal. Although there has been an increasing recognition of the complex and varied nature of growth, in 'mainstream' entrepreneurship growth assessment tends to focus on conventional indicators such as turnover, profit, sales or employment (Vickers and Lyon, 2012). In their study of environmentally-motivated social enterprises in the UK, Vickers and Lyon (2012: 9) found that growth is often contested. As one of their participants argued, "a business can aspire to become the optimum size and remain so, which is a perfectly credible goal". The findings also demonstrate that growth can take multiple forms. The authors highlight the need to examine the meaning of growth in specific contexts and in relation to more varied indicators than purely economic ones, such as socio-environmental objectives fostered by particular philosophical challenges to existing practices and policies. Furthermore, their research provides evidence for the need to develop strategies of growth and sustainability which are congruent with the missions and values of the venture.

Steyaert and Katz (2004) also draw attention to the danger of approaching 'mainstream' entrepreneurship and entrepreneurs within a narrow economic discourse. They argue that "if we want to value and safeguard new possibilities brought in by such new entrepreneurial practices as civic or SE, then we will need to develop a more varied discursive repertoire and develop the very dimensions of the civic and cultural" (Steyaert and Katz, 2004: 188). In their claim for a more multidimensional conception of entrepreneurship (social, cultural, civic, ecological etc.), Steyaert and Katz (2004: 190) also emphasise the need to realise the 'everydayness of entrepreneurship'. They argue that the 'mainstream' economic discourse of entrepreneurship privileges a select group by limiting entrepreneurs to an elite and claim that widening the discourse would open the study of entrepreneurship to other parties. Steyaert and Katz (2004: 193) conclude by claiming (rather ambitiously) that by extending the concept of entrepreneurship to everyday life, it could "deeply affect societal processes, not in the least its democratic culture".

In summary, two broad approaches to defining the third sector and its components can be differentiated: the *exclusive* approach is more narrow and focused, including organisations that are likely to be somewhat homogeneous; the *inclusive* approach is much broader and “seeks to include, rather than to exclude, and to integrate, rather than to separate” (Bridge *et al.*, 2009: 49). Organisations included therefore tend to be relatively heterogeneous. The exclusive approach appears problematic, as definitions which are too narrow may lead to the exclusion of potentially important and interesting organisations, groups or individuals. For this reason, and given the exploratory nature of this study, it will be argued that an inclusive approach is more appropriate for researching OSEs, and better suited to capturing the reality of 50+ SE activity in all its variety and diversity. This therefore includes individuals or informal groups of people who are running ventures with social/environmental aims, irrespective of whether or not they were using a recognised social enterprise form. The implications of adopting this wide approach are further discussed in Chapter 5 (Section 5.5).

As has been argued above, the conceptual confusion around SE and related academic discourses can partly be explained by the fact that it has evolved differently across the world. The following section will add the dimension of policy discourses and demonstrate that, in the UK, whether to adopt an inclusive or an exclusive approach is primarily a political question (Dey and Steyaert, 2010).

3.2.3 SE in Policy and Practice – the UK Context

According to the policy agenda of the current Conservative-Liberal Democrat coalition government, SE has a significant role to play in building the so-called ‘Big Society’. The aim is to move away from a ‘big government’ approach and to give more responsibility to communities and neighbourhoods to address social problems (Conservatives, 2010). In order to facilitate this ‘power shift’ (Cabinet Office, 2010a), the coalition government laid out in its programme for government that it would commit to creating the necessary infrastructure to facilitate “the creation and expansion of mutuals, co-operatives, charities and social enterprises, and enable these groups to have a much greater involvement in the running of public services” (HM Government, 2010: 29). The government has presented social enterprises as being able to provide more personalised public services to the most disadvantaged people, and able to innovate more quickly and effectively than state bodies (Conservatives, 2010).

As will be seen later in this section, the Big Society agenda has been a highly controversial matter (Sloccock, 2012) and is more of a political slogan rather than an analytical concept (Alcock, 2012). Nevertheless, the idea to use social enterprises as a 'panacea' to tackle social issues is not new (Sepulveda, 2009). As Sloccock (2012: 6) explains:

Despite the controversy the Big Society provokes, the concepts behind it have long roots that spread across political parties. For example, strikingly similar objectives, under different titles, have been pursued under Tony Blair's 'Third Way' or under what Gordon Brown called 'civic renewal'.

As Teasdale (2012) points out, as a political construct, emphases of social enterprise have changed across time to serve variations in different government agendas. Consequently, social enterprise means different things to different people in different contexts and at different points in time (Teasdale, 2012: 113).

The Emergence of Social Entrepreneurship

The development of SE has been strongly associated with the influence of neoliberal perspectives, which emphasise a preference for unfettered markets and increased opportunities for business, and the need to restrict the role of the state, including through outsourcing to private sector and civil society organisations (Dey and Teasdale, 2012; Vickers and Lyon, 2012). UK government policy began to more closely explore the potential of SE to the provision of welfare in the 1990s (Huybrechts and Nicholls, 2012). As part of the 'new public management' agenda, the New Labour Government of 1997-2010 promoted increased competition for government contracts amongst private sector and not-for-profit organisations in so-called 'quasi-markets' (Walsh, 1995). At the same time, given the previous focus on business activities under the Conservative Government, discourses of enterprise were more and more frequently applied in the context of public sector and civil society activities, creating new opportunities for social entrepreneurs (Huybrecht and Nicholls, 2012). As a result of opening up public services under successive governments, the UK already had one of the most developed public service sectors in the world before the launch of the current government's policy programme (Sloccock, 2012).

Based on his analysis of the development of SE in the UK between 1999 and 2010, Teasdale (2012: 114) argues that the concept has been constructed by shifts in policy emphases, promoting different organisational forms at different times. As he explains, the construct initially included the co-operative and community enterprise movement and helped to

position social enterprises as a tool to tackle market failure and regenerate deprived areas in line with New Labour's Third Way philosophy of the time. In the years 2001-2005, it was extended further by defining social enterprise as "a business with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or community, rather than being driven by the need to maximise profit for shareholders and owners" (DTI, 2002). The creation of this loose definition permitted the inclusion of social businesses, emphasising business solutions to social problems. The construct was widened further between 2005 and 2010 to also include earned income discourses, promoting voluntary organisations as a vehicle for public service delivery. Teasdale (2012: 99) interprets the rationale behind this inclusive approach and its consequences as follows:

[The meaning of SE] expanded as other actors adopted the language to compete for policy attention and resources. Policy makers deliberately kept the definition loose to allow for the inclusion of almost any organisation claiming to be a social enterprise. This allowed them to amalgamate the positive characteristics of the different organisational forms, and so claim to be addressing a wide range of social problems using social enterprise as a policy tool.

The Nature and Scale of Social Entrepreneurship

It has been argued that, during the period of the New Labour government (1997-2010), the UK brought about the most developed infrastructure for social enterprises in the world, although some developments introduced to further SE are open to interpretation and contestation (Nicholls, 2010a). For instance, the Community Interest Company (CIC) legal form, which was created for social enterprises in 2005/06, does not explicitly require democratic control which, for some, ought to be a key feature (Lyon *et al.*, 2010). However, according to Nicholls (2010a), the fact that it has an asset lock, which prevents assets being used for private gain, necessitates a certain degree of social ownership.

Nevertheless, the fact that social enterprises are not characterised by a single legal form makes conceptualisation problematic and makes it difficult to define and measure its scale and scope. SE has become an all-encompassing 'label' (Teasdale, 2012), including "a range of organisational types that vary in their activities, size, legal structure, geographic scope, funding motivation, degree of profit orientation, relationship with communities, ownership and culture" (Peattie and Morley, 2008: 7), as well as previous forms of non-profit, co-operative and 'mainstream' business (Defourny and Nyssens, 2010).

The figure most frequently stated to demonstrate the scale of the social enterprise sector in the UK is 62,000 and has been provided by the Annual Small Business Survey based on an average figure for the years 2005 to 2007 (Teasdale *et al.*, 2013). Nevertheless, as a closer examination of this figure revealed, the majority of organisations included were private sector businesses while, at the same time, organisations with a third sector legal form (such as CICs, Companies Limited by Guarantee – CLG or Industrial and Provident Societies – IPS) were under-reported or excluded. Hence, despite the promising rhetoric, including under the more recent coalition government, the real scale and nature of the social enterprise sector in the UK remains unknown. As Teasdale (2012) highlights, although the current government has promised to support social enterprises to deliver public services as part of the Big Society agenda, the rationale underlying its approach to SE is by no means different to that of previous governments. The fact that the government has deliberately avoided a clear definition of the term ‘social enterprise’ further supports the argument that social enterprises serve as a policy tool which is used to suit shifting policy emphases over time.

Towards an Ideal Type of SE?

Nicholls (2010b) analysed the content of public statements concerning SE by the main paradigm-building actors¹⁵ and identified three types of discourses of SE, namely narratives based on the ‘hero’ entrepreneur, ‘ideal’ type organisational models based on business, and logics based on communitarian values and social justice. He found that these discourses can be reclassified according to how they relate to providers of greater or lesser resources to actors in the field; meaning that those organisations with access to the greatest resources can be expected to dominate. At the same time, pressures to demonstrate effective return on investment as a means of legitimisation lead to the dominant use of ‘hero’ entrepreneurs and their success stories. Nicholls (2010: 624) argues that, as a result, “the logics of the hero entrepreneur working within a business (or business-like) setting will come to dominate the paradigmatic development of the field, while the logics of communitarian action linked to social justice and empowerment will become marginalized” (see also Chanan and Miller, 2011). Social ventures of the latter type have limited capital, do little grant making, lack marketing power and are operating below the radar of government initiatives. Although opposing the ‘hero’ social entrepreneur narratives and business model ideal types, their voices

¹⁵ These include the UK government, foundations such as UnLtd and the Skoll Foundation, fellowship organisations such as Ashoka and the Schwab Foundation, and network builders such as CAN and the SEC.

within public discourses of SE are often overheard. This policy pressure to promote an ‘ideal type’ of SE will now be examined in more detail.

In recent years, economic stagnation, government cuts and austerity measures provided another influence which forced social organisations to become more entrepreneurial and diversify their funding in order to be more sustainable and less dependent on the state and/or donors (Teasdale, 2012; Di Domenico *et al.*, 2009; Huybrechts and Nicholls, 2012). As a consequence, social enterprises are increasingly encouraged to adopt market-based solutions and businesslike models (Baines *et al.*, 2010; Chell, 2007; Macmillan, 2010; Sepulveda, 2009). Furthermore, there has been increasing pressure on social ventures to demonstrate and measure their social impacts in order to obtain funding and build supportive relationships with stakeholders and other organisations (e.g. Arvidson *et al.*, 2011; Austin *et al.*, 2006; McLoughlin *et al.*, 2009; Stevenson *et al.*, 2010). Whereas some oppose such interventions into their work, others see this as an opportunity for social enterprises to market their products or services and therefore a ‘source of power’ or a socially entrepreneurial tool (Lyon and Arvidson, 2011).

However, as discussed in Section 3.2.1, some social entrepreneurs strongly resist the application of business strategies to addressing social issues. It can be expected that they are most likely to experience the negative consequences of such developments, together with those who do not have the relevant skills and experience. In this context, Vickers and Lyon (2012: 11) found that growth ambitions of social ventures in the English East Midlands were “constrained by the restricted availability of external finance and support in a period of public sector austerity” and, in some cases, by “bias in public sector commissioning towards corporate prime contractors”. These findings are supported by the first comprehensive audit¹⁶ of the government’s ‘Big Society’ flagship programme, pointing out that large private sector organisations remain the greatest beneficiaries (Sloccock, 2012: 9):

The private sector is not only more likely to have the economies of scale and expertise to bid for the increasingly large and complex contracts that have been tendered under successive Governments. The current Government is now starting to link payments to

¹⁶ The audit was undertaken by Civil Exchange, a think tank established to strengthen civil society’s connection to government (see also <http://www.civilexchange.org.uk>), in partnership with Democratic Audit, an independent research organisation focusing on democracy and human rights in the UK (see <http://www.democraticaudit.com>), and DHA who are a policy and communications agency specialising in social change (see <http://dhacommunications.co.uk>). Furthermore, the audit was supported by the Joseph Rowntree Charitable Trust (<https://www.jrct.org.uk>) and the Calouste Gulbenkian Foundation UK (<http://www.gulbenkian.org.uk>).

the delivery of results across a range of areas, creating cash flow problems for the under-resourced voluntary sector. It is particularly hard for small, local voluntary and community organisations to compete, despite the specialist skills and knowledge that they may bring, which could lead to better services.

Furthermore, as Lyon and Sepulveda (2012) point out, the development of an 'enabling environment' has mainly been characterised by a reduction in regulation and the provision of loan finance, based on the assumption that social enterprises are able to exploit these opportunities to grow. However, as will be discussed in Section 3.4.3, some research has shown that social entrepreneurs are less likely to utilise loan finance to fund their ventures than their 'mainstream' counterparts (Shaw and Carter, 2007; Sunley and Pinch, 2012). One of the issues related to such policy interventions therefore is that they are developed without a thorough understanding of the wider dynamics of SE. For instance, as Vickers and Lyon (2012) and Blundel and Lyon (2012) argue, the growth patterns of social ventures differ from those of 'mainstream' enterprises and have to be viewed in terms of their wider social and/or environmental aims, rather than just indicators such as growth in turnover and employment.

According to Dees (2008), scaling is defined as increasing the impact of social entrepreneurial activity to better match the magnitude of the social need or problem it seeks to address. As Heinecke and Mayer (2012) point out, although aimed at expanding the impact for society, scaling of social enterprises does not necessarily require organisational growth. Whereas growth is often discussed in relation to 'scaling wide', i.e. increasing the number of beneficiaries, it can also involve 'scaling deep', i.e. focussing in-depth on a single problem. Furthermore, "growth strategies need to be understood in the context of institutional changes and the constraining and/or enabling nature of markets, publicly enabled quasi-markets and other related institutional/regulatory structures" (Vickers and Lyon, 2012: 11). According to Blundel and Lyon (2012), the need to balance multiple objectives means that the attempt to maximise growth in one area may have unintended consequences in another. They therefore conclude that policy intervention needs to be based on a better understanding of the complex needs and capabilities of social ventures, and their embeddedness in the historical economic, political and societal context.

It is also of interest to note that, according to the website of the coalition government, it is "working to help people take action to solve their own problems and create strong, attractive and thriving neighbourhoods"¹⁷. Given the issues outlined above in combination with the

¹⁷ See <https://www.gov.uk/government/topics/community-and-society> [Accessed on 25th April 2013].

outcomes of an initial assessment of the Big Society, there appears to be a clash between government rhetoric and reality with respect to the creation of an 'enabling environment' for those who decide to become involved in social entrepreneurial activity in their local community (Sepulveda *et al.*, 2013).

This study will explore the role of these developments and contexts in case of OSEs, and examine how they enable and constrain 50+ SE activity. At the same time, it will provide important insights regarding the extent to which OSEs' activities represent the ideal or communitarian type action of SE, as discussed above.

3.3 The Social Entrepreneur – Towards the Deconstruction of the 'Heroic Individual'

Much of the research on social entrepreneurs has been focused on what they do and do not have in common with 'mainstream' entrepreneurs (e.g. Austin *et al.*, 2006; Boschee and McClurg, 2003; Chell, 2007; Dees *et al.*, 2001; Drucker, 1990; Leadbeater, 1997). This section will demonstrate the influence of theories discussed in the last chapter on theory building in SE, and will show that the development of SE has followed a similar route, drawing out the relevant issues and questions raised for the study of OSEs.

3.3.1 Personality and Special Abilities

Interestingly, despite having been subject to considerable criticism, traits theories have been used extensively in attempts to conceptualise social entrepreneurs (Achleitner *et al.*, 2011; Drayton, 2002; Ernst, 2012; Boschee 2006; Light 2008; Mair and Noboa 2006; Nga and Shamuganathan, 2010). It has been suggested that social entrepreneurs all share very special and rare characteristics which lead to them being presented as "social hero[es] with 'entrepreneurial talent'" (Seelos and Mair, 2005: 244; Drayton, 2002; Jones *et al.*, 2007). Thompson (2006) differentiates between people who are running social enterprises or are socially enterprising and the 'true' social entrepreneurs who commit their lives to the mission underlying their work. According to Bill Drayton (2002), the founder of Ashoka¹⁸, social

¹⁸ Ashoka - Innovators for the Public is a non-profit organisation, founded in 1981 to identify and support social entrepreneurs - "individuals with innovative solutions to society's most pressing social problems. They are ambitious and persistent, tackling major social issues and offering new ideas for wide-scale change" (see <https://www.ashoka.org>).

entrepreneurs are motivated to change the whole of society. As a result, just like their 'mainstream' counterparts, social entrepreneurs are often presented within public discourse as enabled individuals who are able to overcome any constraints.

According to Dees *et al.* (1998a), social entrepreneurs are 'a rare breed' of the genus entrepreneur, who exhibit a set of exceptional behaviours. In their view, the main difference to their mainstream counterparts is that social entrepreneurs are driven by a specific social mission and objective "to make the world a better place" (Dees *et al.*, 2001: 4). Although they argue that no one is born a social entrepreneur, and that individuals learn and develop the required skills and characteristics over time in their lives, in their frequently quoted definition they list five factors to describe the behaviour of social entrepreneurs (Dees *et al.*, 2001: 5):

- Adopting a mission to create and sustain social value (takes priority over generating profits).
- Recognizing and relentlessly pursuing new opportunities to serve that mission.
- Engaging in a process of continuous, adaptation, and learning.
- Acting boldly without being limited to resources currently in hand.
- Exhibiting a heightened sense of accountability to the constituencies served and for the outcomes created.

These characteristics have been highly debated and criticised for drawing an idealised picture of the social entrepreneur, one which appears somewhat unrealistic and is based on limited empirical evidence (Huybrechts and Nicholls, 2012). However, in a publication including an earlier version of this definition, Dees (1998a) softened this description by pointing out that only the 'ideal social entrepreneur' would show all these characteristics fully, and that others might display these behaviours to different degrees and in different ways.

Perhaps unsurprisingly, and as in the case of 'mainstream' entrepreneurship, definitions and typifications of 'social' entrepreneurs' are still contested. In relation to social entrepreneurs the heroic rhetoric is also to a large extent based on a small number of cases and assumptions about their representativeness. What empirical research there is largely consists of case studies of successful cases, or on small sample studies from which it is difficult to generalise (Dey, 2010; Mair and Marti, 2006; Seelos and Mair, 2005; Short *et al.*, 2009). Furthermore, the notion of the social entrepreneur as 'hero' has been reinforced through its prevalence in the policy discourse as providers of solutions to pressing social problems (Dey and Steyaert, 2012; Huybrechts and Nicholls, 2012). Dey and Steyaert (2012: 259) highlights the risks of basing SE

and the nature of the social entrepreneur on assumptions, as they might “become naturalised as established truths”:

Many ideas in the field of social entrepreneurship, developed in other disciplines (notably management and business entrepreneurship studies) seem to be applied to social entrepreneurship in a rather flippant manner. Such casual, unelaborated associations risk basing social entrepreneurship on false premises (e.g. Cook *et al.*, 2003), and it can be observed that after some time, such assumptions tend to take on an existence of their own.

As in ‘mainstream’ entrepreneurship (Kets de Vries, 1985), some work has also drawn attention to the ‘dark side’ of *social* entrepreneurship (Dacin, 2010; Mair, 2010; Hoogendoorn and Hartog, 2010). Criticisms include the inefficient use of resources (Mair, 2010) and point to cases of community activism which reinforce prejudice and fundamentalism. For instance, Abdukadirov (2010) argues that terrorists may be viewed as social entrepreneurs, given that they are motivated by social returns rather than profits.

Dey and Steyaert (2012) therefore highlight the need to demystify SE through empirical research to examine the extent to which the assumptions about the social entrepreneur are consistent with reality. As the following sections will demonstrate, as in the case of ‘mainstream’ entrepreneurship, an increasing body of literature has helped to deconstruct the notion of the social entrepreneur as ‘heroic’ individual by drawing out the importance of SE as a collective phenomenon and the diversity of the individuals involved. In addition, some research has identified social entrepreneurs as ‘everyday people’ and, rather than focusing on presenting them as a select elite, indicated the need to acknowledge the diversity of the group.

3.3.2 Team Leadership and Network Embeddedness in Social Entrepreneurship

The relationship between networks and entrepreneurial teams and their importance for a better understanding of entrepreneurial behaviour was discussed in Chapter 2. As Huybrechts and Nicholls (2012) point out, in the ‘Anglo-sphere’ of the UK and US, SE research has developed differently in comparison to continental Europe. In the UK and US studies have concentrated on the commercialisation of the not-for-profit sector in the context of moves to increasingly outsource and privatise public services. On the other hand, in Europe the focus has been on collective action and analyses focused on the organisational level rather than the

wider policy context. However, the distinctions between these two traditions have become increasingly blurred. This is also reflected in the development towards the recognition of the importance of team leadership and networks in SE.

However, the ongoing focus on the social entrepreneur as individual, particularly within policy discourse, has been criticised for not reflecting the reality of SE, and for ignoring the role of collective efforts in practice (Huybrechts and Nicholls, 2012; Light, 2006, 2008; Short *et al.*, 2009). Spear (2006) and Amin (2009) found in their studies that the picture of the 'heroic' individual who is solely responsible for the achievements involved may be a myth. Based on evidence from an ethnographic study of social enterprises in Bristol, Amin (2009: 38) found that "most of the key individuals are appointed directors, answering to a board of trustees or management board". He also points out that they "are 'career' professionals or experienced social economy actors [...] and are rarely solely responsible for the success of the organization" (Amin, 2009: 9-10). Both Spear (2006) and Amin (2009) draw attention to the fact that successful social enterprises are often led by teams.

Another important insight is provided by the social network approach introduced in the previous chapter. As pointed out, network theory has been used to deconstruct the presentation of entrepreneurs as 'heroic' individuals and research has also shown the important role of networks in supporting SE (Hervieux and Turcotte, 2010; Mair and Schoen, 2007; Shaw, 2004; Shaw and Carter, 2007; Thompson, 2002; Blundel and Lyon, 2012; Nicholls, 2006a). For example, Shaw (2004: 201) draws out the particular value of networks in identifying the needs of the 'hard to help' in specific local contexts:

Given the difficult social needs often addressed by social enterprises, this finding suggests that the networking undertaken by social enterprises was important in developing the trust and credibility required, especially locally, to encourage the community to support their activities.

Trivedi and Stokols (2011) also point out the importance of the reputation or credibility of the social entrepreneur in enabling them to build networks and mobilise resources. Furthermore, Nicholls (2010b) speaks of building 'community voice', maximising community engagement and empowerment motivated by values of social justice and communitarianism. The role of team-led social ventures as well as the nature of networks and networking will be explored in Chapters 6, drawing on the empirical evidence gathered for this study.

3.3.3 Self-Identity as Social Entrepreneurs

Research which examines how social entrepreneurs perceive themselves has further contributed to the deconstruction of the social entrepreneur as 'hero'. Dey (2010: 22) examines how ideas of SE are constructed through language, arguing that "the subject position of the social entrepreneur largely relies on the use of cultural icons" and successful 'cases'. In their study on the language of social entrepreneurs, Parkinson and Howorth (2008: 301) found that social entrepreneurs did not associate with the language used by policy-makers, funders and support organisations to refer to SE, and were not comfortable using the label 'social entrepreneur' to refer to themselves, describing it as 'amusing', 'ridiculous' and 'too posh' and that they did not use terms such as heroes, risk or innovation in their language. One strong theme in their language centred around *helping people take charge of their lives*, which seemed to be based on their 'sense of social morality' rather than the entrepreneurship discourse of policy makers and SE promotional agencies. Hence, Parkinson and Howorth (2008: 286) warn of the danger that the existing mismatch between different parties in how language is used may lead to "lack of understanding, conflict, misallocation of resources and loss to the sector".

A tension can therefore be seen to exist between the historical development of the concept of an entrepreneur, and the people that do actually practise entrepreneurship, which is being replicated in the field of SE (Thompson, 2002). This poses some interesting questions as to the link(s) between the popular conception of a (social) entrepreneur and the way in which individuals self-construct their identity as entrepreneurs (Parkinson and Howarth, 2008). A focus on traits and psychology is therefore far too reductionist and contributes to the discursive creation of a hegemonic model of the social entrepreneur as s/he ought to be (Humbert *et al.*, 2010). Such critiques also indicate the need for further research on how 'social entrepreneurs' perceive and represent themselves.

Drawing on an in-depth case study, Teasdale (2012) demonstrates how social entrepreneurs present themselves differently to different audiences in order to access funding. He found that 'impression management' was used to conform to the strategic interests of funders in the social enterprise being presented in a particular way. In this context, Chapter 6 will examine the self-identity and representation of the study participants as social entrepreneurs and, relatedly, their use of SE terminology.

Some empirical research has contributed to drawing a more realistic picture of SE, highlighting that many social entrepreneurs do not perceive themselves as being different from other,

‘common’, entrepreneurs (Thompson 2002). Indeed, Seelos and Mair (2005) point out that social entrepreneurs were often not aware that they are one until they had received an award or are recognised by support organisations such as Ashoka or the Schwab Foundation. Hudson (2009) argues that there are also those ‘social revolutionist’ social entrepreneurs who perceive and represent themselves as vitally different from business entrepreneurs, because they perceive the social mission as ‘raison d’être’ and strongly decline the application of business strategies to social questions. Based on evidence from his study of social enterprises in Bristol, Amin (2009: 31) points out that “life in the social economy is pretty unglamorous, sometimes slow or without future promise, and often hard work for relatively small gains”. Consequently, he concludes that rather than being heroic figures, as is often claimed, social entrepreneurs tend to be ‘extraordinarily ordinary’ people. This finding provides support for the validity of Steyaert and Katz’s (2004) request to recognise the ‘everydayness’ of enterprise (2004) and Kirzner’s (1973) view that entrepreneurship can ‘happen’ to anyone.

This insight highlights the difficulty of ever gaining a full picture of the extent of SE. Although these individuals might show particularly interesting characteristics, many may not be included in studies on this group because they do not self-identify as social entrepreneurs and, hence, leave the knowledge on social entrepreneurs incomplete.

The discussion so far indicates the need to further examine how many social entrepreneurs perceive themselves as ‘heroes’ and ‘saviours’, or maybe just as common people who are trying ‘to help’, and if there are any differences in self-perceptions between OSEs and their younger counterparts. The ‘nature’ of participants’ self-identity as social entrepreneurs will therefore be discussed in more depth in Chapter 6. It will be argued that the findings in this respect help to shed light on the older people’s apparent under-representation in SE.

3.3.4 The Diversity of Social Entrepreneurs

As previously suggested, one reason for the difficulties in identifying a universal set of characteristics that describe social entrepreneurs is the diversity of the group. It might, hence, simply not be possible to fit them all under one umbrella. As Andrew Mawson (2008: 6), a social entrepreneur who developed the renowned Bromley-by-Bow Centre¹⁹ in East London, points out, “when you think you have them neatly placed in a box, like Houdini they find a way

¹⁹ The Bromley-by-Bow Centre is located in one of the most deprived areas in Britain and provides healthcare and education, creates jobs and generates wealth for the area (Leadbeater 1997).

out“. Even if possible, it is questionable whether such a set list of traits is desirable as there is a risk of ending up with something like a ‘tick box exercise’ and individuals who clearly have entrepreneurial talent or potential might be discouraged if they feel that they do not meet the essential social entrepreneur criteria (Thompson, 2002; Humbert, 2009).

Table 3.2: A Typology of Social Entrepreneurs

Type	Social Bricoleur	Social Constructionist	Social Engineer
Theoretical inspiration	Hayek	Kirzner	Schumpeter
What they do?	Perceive and act upon opportunities to address local social needs they are motivated and have the expertise and resources to address.	Build and operate alternative structures to provide goods and services addressing social needs that governments, agencies, and businesses cannot.	Creation of newer, more effective social systems designed to replace existing ones when they are ill-suited to address significant social needs.
Scale, scope and timing	Small scale, local in scope—often episodic in nature.	Small to large scale, local to international in scope, designed to be institutionalized to address an ongoing social need	Very large scale that is national to international in scope and which seeks to build lasting structures that will challenge existing order.
Why are they necessary?	Knowledge about social needs and the abilities to address them are widely scattered. Many social needs are non-discernable or easily misunderstood from afar, requiring local agents to detect and address them.	Laws, regulation, political acceptability, inefficiencies and/or lack of will prevent existing governmental and business organizations from addressing many important social needs effectively.	Some social needs are not amenable to amelioration within existing social structures. Entrenched incumbents can thwart actions to address social needs that undermine their own interests and source of power.
Social Significance	Collectively, their actions help maintain social harmony in the face of social problems	They mend the social fabric where it is torn, address acute social needs within existing broader social structures, and help maintain social harmony.	They seek to rip apart existing social structures and replace them with new ones. They represent an important force for social change in the face of entrenched incumbents.
Effect on Social Equilibrium	Atomistic actions by local social entrepreneurs move us closer to a theoretical “social equilibrium.”	Addressing gaps in the provision of socially significant goods and service creates new “social equilibriums.”	Fractures existing social equilibrium and seeks to replace it with a more socially efficient one
Source of Discretion	Being on the spot with the skills to address local problems not on others’ “radars.” Local scope means they have limited resource requirements and are fairly autonomous. Small scale and local scope allows for quick response times.	They address needs left un-addressed and have limited/no competition. They may even be welcomed and be seen as a “release valve” preventing negative publicity/social problems that may adversely affect existing governmental and business organizations.	Popular support to the extent that existing social structures and incumbents are incapable of addressing important social needs.
Limits to Discretion	Not much aside from local laws and regulations. However, the limited resources and expertise they possess limit their ability to address other needs or expand geographically.	Need to acquire financial and human resources necessary to fulfill mission and institutionalize as a going concern. Funder demands oversight. Professional volunteers and employees are needed to operate organization.	Seen as fundamentally illegitimate by established parties that see them as a threat, which brings scrutiny and attempts to undermine the ability of the social engineers to bring about change. The perceived illegitimacy will inhibit the ability to raise financial and human resources from traditional sources. As a consequence, they may become captive of the parties that supply it with needed resources.

Source: Zahra et al. (2009: 523)

One attempt to develop a typology of social entrepreneurs which better reflects their diversity is that of Zahra *et al.* (2009). These authors build on the work of Hayek, Kirzner and Schumpeter, taking into account the different motives, types of ventures created and organisational activities (see Table 3.2). They identify three types, namely ‘social bricoleurs’,

‘social constructionists’ and ‘social engineers’, whose activities range from addressing small-scale ‘local social needs’ to initiatives that involve large-scale ‘revolutionary change’. However, while better reflecting the large spectrum of SE activity, claims made for the third ‘social engineer’ represents a highly idealised, almost ‘super hero’ type, raising the question as to how many social entrepreneurs can actually fall within this category. An important weakness of this typology is that it is theory-led and insufficiently grounded in empirical research. Nevertheless, the typology provides a starting point for empirical research on social entrepreneurs and its influence on this study of OSEs will be discussed in more depth in Chapter 6.

Further neglected dimensions within entrepreneurship studies relate to gender and ethnicity. Until fairly recently, the majority of the literature on ‘mainstream’ entrepreneurship gave little attention to women (Carter *et al.*, 2001; Carter *et al.*, 2006) and ethnic minority entrepreneurs (Omar *et al.*, 2006). This has been a major weakness of entrepreneurship literature, arguably reducing the validity of previous studies. However, more lately, women (Humbert, 2012) and ethnic minority social entrepreneurs (Calvo, 2012; Sepulveda *et al.*, 2010) have received some recognition in the literature.

Similarly, Steyaert and Katz (2004: 192) claim that there is a need to widen the entrepreneurship discourse to be more inclusive of social, cultural, civic or ecological aspects:

[A] cultural conception of entrepreneurship might also imply that some non-traditional groups of entrepreneurship, who are not ‘comfortable’ with the label entrepreneurial (such as women) feel less estranged by being described as such and might come to re-evaluate their daily activities.

The importance of looking at SE through the diversity lens becomes particularly evident when exploring who the social entrepreneurs are. Given the plethora of literature on the characteristics of social entrepreneurs, comparatively little statistical information is currently available on the age, ethnicity or social background of social entrepreneurs. However, research by Levie and Hart (2011)²⁰, drawing on a sample of 646 early-stage²¹ business and 208 early-stage social entrepreneurs in the UK (n= 854), found the following:

²⁰ The research drew on data from a survey of 21,000 adults in the UK in 2009 (GEM 2009). For the purpose of the study, social entrepreneurs were defined as individuals or groups who were “trying to start or [are] managing any kind of activity, organisation or initiative that has a particularly social, environmental or community objective? This might include providing services or training to socially deprived or disabled persons, using profits for socially oriented purposes, or organising self-help group for community action etc.” In addition to this question, in order to be categorized as social entrepreneur, respondents had to show their emphasis on social/environmental objectives by

- Women are more likely to establish a social than a 'mainstream' enterprise, with similar male and female rates of SE activity (in contrast to much higher male rates of participation in mainstream entrepreneurship);
- Younger people (18-24) are more likely to get involved in social than in business entrepreneurship;
- The older age groups (over 55), however, are among the age groups least likely to get involved in SE;
- Early-stage social entrepreneurs are slightly less likely to be from ethnic minorities than early-stage business entrepreneurs;
- People with increasing levels of education are more likely to be social than business entrepreneurs.

These findings which show that social entrepreneurs differ from 'mainstream' entrepreneurs in a decisive way are very important in supporting the argument that social entrepreneurs deserve special attention. There is a proportionately higher level of SE amongst young people and women, and a lower level amongst older people and ethnic minorities, than in business entrepreneurship. There is therefore a need to further explore why these particular groups are more or less often found in SE than in 'mainstream' entrepreneurship.

Furthermore, Shaw *et al.* (2002) and Levie and Hart (2011) found that degree level education appears to be a strong predictor of SE activity, with particularly high levels of SE amongst those with Masters and Bachelors level qualifications. Education is, hence, another factor which has to be taken into consideration when researching social entrepreneurs.

As has been shown, social entrepreneurs are a very diverse group and it is impossible to discuss their experiences without looking at their age, gender, ethnicity, educational background and the wider socio-economic and cultural contexts in which they are embedded. The older age group (over 55s) is identified as one of the age groups least likely to become involved in SE (Levie and Hart, 2011), indicating the need for further research as to why this might be. Focusing on OSEs, this study therefore responds to this research gap, while also taking into account the influence of structural factors on their SE activities.

allocating more percentage points (at least 51 per cent) to these matters than to economic value creation.

²¹ The authors define early stage (social) entrepreneurial activity as "the creation of new business (social economic) activity, which includes both the startup process, or nascent business (social) entrepreneurial activity, and the management of a new business (social) venture" (Levie and Hart, 2011: 206).

3.4 Social Entrepreneurs and the Social Entrepreneurship Process

This section will further demonstrate the influence of entrepreneurship theories on theory-building in SE. It will provide an understanding on the debate on the similarities and differences between social entrepreneurs and their 'mainstream' counterparts by discussing their role in the SE process, and draw out the most relevant issues for the study on OSEs.

3.4.1 Social Value Creation through (Social) Innovation and Creativity

According to the literature, the main difference between social and 'mainstream' entrepreneurs lies in the social entrepreneur putting the main emphasis on social objectives and the creation of social value rather than personal profit (e.g. Dees *et al.* 2001; Seelos and Mair, 2005; Volkmann *et al.*, 2012). In Dees' (2001) view, the success of social entrepreneurs is therefore measured by the extent to which they create social value. However, others (Boschee and McClurg, 2003; Chell, 2007) argue that their success depends on whether they manage to both create social value and be financially self-sustainable or self-sufficient (see Section 3.2.1).

Another concept which has been of increasing interest in the context of SE is social innovation which Huybrechts and Nicholls (2012: 39) broadly define as providing "new solutions to social needs". However, as they point out, SE is not the only vehicle for social innovation (Huybrechts and Nicholls (2012: 39):

While much of the literature has focused on innovation as inherent in entrepreneurship and market orientation, the concept of social innovation tends to consider innovation in a much broader way. Social innovation [...] is not necessarily market-based and can be found in any sector (Mulgan *et al.*, 2007; Phills *et al.*, 2008).

Of particular relevance for this study is the OECD's (Noya, 2010) view that social innovations are increasingly important in terms of providing new services that enhance the quality of life (QoL) of individuals and communities (Spear, 2011). The concept of QoL in old age will be discussed in some depth in Chapter 4 and its importance in relation to 50+ SE motivations will be discussed in Chapter 7.

In any case, as in 'mainstream' entrepreneurship, it is argued that innovation and creativity are important sources of value creation. Shaw and Carter (2007: 431) found that social

entrepreneurs are creative and innovative by “applying novel solutions to intractable social problems”. Similarly, it has been suggested that they have a special talent which allows them to cut down apparently insoluble social problems to ‘bite-sized pieces’ (Seelos and Mair, 2005). However, although a shared characteristic of both groups of entrepreneurs, it has been suggested that social entrepreneurs may be even *more* creative and innovative than their mainstream counterparts (Drayton, 2002; Leadbeater, 1997; Shaw and Carter, 2007).

Given that it emerged as important in the study of 50+ SE, the different ways in which OSEs create value, as well as its nature will be explored in Chapters 6 and 7.

3.4.2 Opportunity Recognition and Development in Social Entrepreneurship

Chapter 2 discussed opportunity recognition as an essential component of entrepreneurship (Lehner and Kansikas 2012). However, opportunity recognition among social entrepreneurs remains an under-researched field. As Lehner and Kansikas (2012) point out, although having been recognised as a key theme in SE (Corner and Ho, 2010; Hockerts *et al.*, 2010; Mair *et al.*, 2007; Shaw and Carter, 2007; Weerawardena and Mort, 2006), few scholars have studied this topic in more depth, and none have made use of a quantitative approach.

According to Shaw and Carter’s (2007) findings, opportunity recognition in SE can be distinguished from ‘mainstream’ entrepreneurship in its focus on meeting *social* needs, often in specific geographic and/or community contexts. In her qualitative study of social enterprise in the UK, Shaw (2004) found that 84% of participants lived in the area where the social need was located. Furthermore, research by Stephan *et al.* (2012) suggests that social entrepreneurs have a distinct value profile which leads to them identifying different (i.e. SE related) opportunities from their ‘mainstream’ counterparts, since their pro-social emphasis leads to them opting for career pathways as social rather than ‘mainstream’ entrepreneurs.

As in entrepreneurship research, there has been a move towards recognising the complexity of the SE process. Corner and Ho (2010) draw on case study evidence to develop a spectrum of SE opportunity development, ranging from an effectuation to involving a more rational/economic process. The difference between these two was illustrated through Sarasvathy’s (2001b) analogy with a chef in Section 2.4.2. They found that, as a key pattern, effectuation processes dominated across all cases, and argue that the effectuating social entrepreneur is also

reflected in Dees' (2007) description of SE opportunities as the outcome of messy, active learning processes.

Furthermore, as part of the spectrum, Corner and Ho (2010: 653) identified three types of 'sparks' (effectuation, mix/balance and rational/economic) which they defined as "the moment of insight when the idea surfaced for a possible new way to create value". As they (Corner and Ho, 2010: 654) argue, the 'spark' provides a concept worthy of research in its own right, as it is different to the classic idea of opportunity recognition:

The classic idea is that opportunities are fully formed and waiting to be discovered by an entrepreneur. [...] the spark can reflect quite an unformed idea at the effectuation extreme of the opportunity development spectrum and only a partially formed idea at the mix/balance part of the spectrum.

Although based on limited evidence from just three cases, their notion of the 'spark', illustrated in their model of opportunity development provides a useful construct for research in the case of OSEs. In Chapter 7, it will be demonstrated how the addition of a life course perspective can provide a better understanding of the SE opportunity development process, particularly in relation to the effectuation and rational/economic perspectives.

3.4.3 Social Entrepreneurs' Attitude Towards Risk

Risk taking behaviour was identified as another key differentiator by Shaw and Carter (2007). Whereas the use of personal and family finance is often a key funding resource for 'mainstream' enterprises, social entrepreneurs were found to be less likely to experience personal financial risk, as they rarely invested or risked personal finance in their organisations. Similarly, the Bank of England (Brown and Murphy, 2003) also found in its study on social enterprise finance that directors of social enterprises were "less willing (or able) than private entrepreneurs to provide a personal guarantee to banks or to invest his or her own capital in the enterprise" (Peattie and Morley, 2008: 15). A recent study by Sunley and Pinch (2012) also found social entrepreneurs to be less likely to seek conventional business loans or equity finance to fund their ventures than 'mainstream' entrepreneurs. However, according to Shaw and Carter (2007: 428), personal risk also exists for social entrepreneurs in a non-financial form, as "by involving and using their contacts to gain support for their enterprises, participating entrepreneurs put at risk their local credibility and their network of personal relationships". Nevertheless, risk taking behaviour in SE is still an under-researched field and therefore provides interesting opportunities for future research.

This study found interesting patterns around participants' risk taking behaviour and its influence on SE motivations, which will be presented in Chapter 7. It will provide insight on individuals' changing risk taking propensity over time in their lives and the influence of changing circumstances in form of life stages.

As Chapter 7 of this thesis will be giving special attention to the motivations of OSEs, the following section will discuss prior work and gaps in knowledge around this topic.

3.5 Motivations of the Social Entrepreneur

As Carsrud and Brännback (2011) point out, although the lure of profit has traditionally been seen as the main reason for embarking on entrepreneurship (Schumpeter 1934), more recently it has been recognised that there can be other primary motivations for venture creation, such as social gains in SE. Apart from the general agreement regarding the focus on social objectives as a key motivation (e.g. Austin *et al.*, 2006; Huybrechts and Nicholls, 2012; Spears, 2006), there currently is a dearth of research on SE motivations. This section will present some initial qualitative and quantitative findings on the subject and draw out their relevance to the study of OSEs.

3.5.1 Insights from Quantitative Research

Applying a cognitive approach to studying motivations and drawing on large-scale survey data, Stephan *et al.* (2012) found that social entrepreneurs have a different value profile, and therefore different motivations, to 'mainstream' entrepreneurs. Using Schwartz' (e.g. Bilsky and Schwartz, 1994; Schwartz and Boehnke, 2004) '10 value types', discussed in Chapter 2, their research provides support for previous studies (De Hoogh *et al.*, 2005; Egri and Hermann, 2000; Lukes and Stephan, 2012) which, drawing on a smaller sample size, suggested that social entrepreneurs may be emphasising pro-social values with a focus on social context outcomes such as helpfulness, social justice and equality (self-transcendence), while de-emphasising self-interest, self-enhancement values (Stephan *et al.*, 2012). For instance, Lukes and Stephan (2012) found that while non-profit leaders are mainly motivated by 'other-regarding motives', such as the meaningfulness of their work and providing help to others, for-profit entrepreneurs were predominantly driven by 'self-regarding motives', such as independence,

autonomy, income and profit. Stephan *et al.*'s (2012: 18) argue that social entrepreneurs do not care about people they are close to more than other people, but they do care more than other people about "the welfare of people and nature in general". One shortcoming of Stephan *et al.*'s (2012) study is that it does not take into account the wider context in which these value profiles are embedded. According to their approach, values become stable in early adulthood (Bardi *et al.*, 2009) and, although it is recognised that learning affects 'value-relevant domains', values themselves remain unchanged. It therefore does not take into consideration how motivations are influenced by life course experiences such as pivotal moments, and does not explain why some individuals choose to become involved in SE in later in life.

As discussed in the context of entrepreneurship motivations (see Section 2.5), Jayawarna *et al.* (2013: 12) used the motivational patterns that they identified to develop six entrepreneur clusters, one of which was labelled 'social entrepreneur' (13% of their sample) and characterised as follows:

These entrepreneurs rated contribution to community as their primary motive, plus flexibility and achievement related to business ownership and some desire to emulate role models. This group showed minimum concern for material benefits and status.

In addition, this group was educated, a higher proportion of it was female and the majority was from a minority ethnic background. According to Jayawarna *et al.* (2013: 18), this finding suggests that "women from ethnic minorities seem more likely to have a social motive for entrepreneurship, perhaps reflecting a desire to serve a disadvantaged community". Furthermore, this group was educated and older than all other types identified, apart from the 'prestige and control' entrepreneurs who comprised older, well educated men. These findings regarding the demographic pattern of this group are of special interest to this study, as they show similarities with those of one of the OSE types identified (see Chapters 6 and 7).

3.5.2 Insights from Qualitative Research

Drawing on 16 qualitative in-depth interviews, Germak and Robinson (2012) found five emerging themes related to SE motivation in their exploratory study: 1) personal fulfilment; 2) a desire to help society; 3) non-monetary focus; 4) achievement orientation; and 5) closeness

to the social problem. Personal fulfilment is related to Maslow's (1943) hierarchy of needs²², in which self-actualisation has to be seen in contrast to the most fundamental needs such as breathing, food, water or sleep. In relation to the non-monetary focus, they found differences amongst the participants in the extent to which they felt comfortable to talk about financial matters. For interviewees with a public services background, "money and financial management were especially uncomfortable aspects of launching a social venture", whereas respondents with experience in 'mainstream' entrepreneurship spoke more freely and maturely about these issues (Germak and Robinson, 2012: 14). The achievement motive (McClelland *et al.*, 1953) has already been discussed in the context of traits and motivations in Chapter 2. The 'closeness to the social need' motive draws on studies on public service motivation which found that individuals working in this field are driven by a perceived duty to give back to society through their work (Denhardt *et al.*, 2009), or that they are motivated by emotional (Perry and Wise, 1990) or personal reasons (London, 2010), such as having a personal connection to the social problem (Germak and Robinson, 2012). However, although Germak and Robinson (2012) report differences in motivations based on participants' professional background, they do not explicitly draw attention to these or other contextual influences in their findings.

Shaw and Carter (2007), on the other hand, draw out some interesting insights regarding the role of previous experience. In their study of 80 social entrepreneurs from across the UK, they found that almost one third (32%) of interviewees had prior third sector experience and more than one third had been self-employed before setting up their social venture. In addition to qualifications and experience, participants identified life skills as being crucial to their SE activities. These findings are in line with research on 'mainstream' entrepreneurs and, according to Shaw and Carter (2007: 424), suggest "that participants establish social enterprises later in life once they have acquired both education and life experiences". In addition, they point out that a considerable number of their study participants were either serial social entrepreneurs or that they had developed a portfolio of social ventures. These findings can be seen in relation to extrinsic and intrinsic achievement motivation discussed in Chapter 2.

While the social entrepreneurs studied had similar professional backgrounds as their 'mainstream' counterparts, their motivations were quite different. In line with other literature

²² Maslow's (1943) hierarchy consists of five sets of needs, from very basic to more intellectual desires, which man aims to achieve and maintain. In summary, these refer to physiological, safety, love, esteem, and self-actualisation needs.

(e.g. Leadbeater, 1997; Prabhu, 1999), Shaw and Carter (2007: 426) argue that, although in both cases the key motivator was to address an unmet need, the crucial difference was the type of need or opportunity identified: “the type of opportunity addressed by social entrepreneurs is a social, community or public need which remains unmet by both the public sector and the established charity sector”.

Social entrepreneurs were also found to accord a lesser priority to independence (11%)²³ and personal financial security (9%) as reasons for their SE involvement compared to ‘mainstream’ entrepreneurs. The most highly ranked influencing factors identified were (in order of importance): belief in the work of the enterprise (9%); to affect change and make a difference (90%); to meet local needs (86%); to tackle a social issue (79%); personal satisfaction (76%); I was inspired (63%); to gain life experience (46%); and to change the direction of my career (30%). Factors such as having been made redundant (6%) and unemployment (4%), on the other hand, were ranked as being of low importance. These findings clearly support that individuals become involved in SE due to a desire to do so rather than necessity.

To sum up, apart from the identification of the focus on social aims as key motivator, in-depth research on SE motivations has so far been limited. Although the studies cited provide a general understanding of what drives individuals to become involved in SE rather than ‘mainstream’ entrepreneurship, understanding of SE motivations is currently partial. Some initial research has focused on studying values, but these are only one element influencing motivations. In addition, it only captured value priorities at the time of the research and therefore fails to take into account the more complex nature of motivations. Those studies that have taken the influence of individuals’ background and structural factors on motivations into account still do not explain why individuals choose to become involved in SE at a particular time in their lives and why some opportunities are exploited and others not, a key gap which will be addressed in Chapter 7.

²³ The percentage refers to proportion of respondents ranking the item as 5,6 or 7 on the Likert-type scale 1-7.

3.6 Conclusion

This chapter has provided the background knowledge on SE and social entrepreneurs required as a basis for studying OSEs including an understanding of the current socio-economic and political climate in which they are operating.

As has been shown, attempts at conceptualising SE activity and social entrepreneurs mostly centre around comparisons with 'mainstream' entrepreneurial activity and entrepreneurs, using the key elements of entrepreneurship theory, as identified at the beginning of Chapter 2, as a means of analysis. There is little consensus on whether SE is best viewed as a form of entrepreneurship or whether it is distinct from it, and the difficulties this poses for researching the field have been pointed out. However, the main question appears to be whether it is actually practicable to arrive at a common narrative for SE, while drawing a realistic picture of the phenomenon which is neither too inclusive or too exclusive.

What the discourse has led to, however, is an idealised picture of what SE and social entrepreneurs can achieve, which has been reinforced through its prevalence in the policy discourse as those who will fix social problems. This phenomenon has been discussed in the context of the 'hero' narrative. As has been argued, the presentation of social entrepreneurs as high achieving 'heroes' does not do justice to the diversity of the group and the variety of the activities involved and their varied impacts. Furthermore, as with 'mainstream' entrepreneurship, research that found that social enterprises are often led by teams and that they make extensive use of social networks has helped to redefine SE as a collective phenomenon. Nevertheless, there is still a dearth of empirical research and therefore an urgent need to develop an evidence base that provides a more realistic understanding of social entrepreneurs. In this context, other authors have also suggested opening the entrepreneurship discourse to a more diverse group of people (including social entrepreneurs) and recognise the 'everydayness' of (social) entrepreneurial activity (Steyaert and Katz, 2004).

Given its exploratory nature, this study adopts an approach which takes into account the diversity of OSEs and their SE activities, drawing on perspectives as offered by the concepts of embeddedness, multi-dimensionality and culture inclusiveness, which are better suited than traits theories (see Chapter 2) for analysing and explaining SE activity. The implications of these insights for researching social entrepreneurs will be discussed in detail in Chapter 5.

Furthermore, motivations have recently been rediscovered as playing a vital role in the entrepreneurial process as the missing link between opportunity recognition and exploitation. Apart from the identification of the focus on social aims as a key motivator, in-depth research on SE motivations has so far been limited, so that our understanding of what is driving individuals to become involved in SE is incomplete. Given that motivations have emerged as an important component for understanding OSEs, Chapter 7 will present an in-depth exploration of motivations from a life course perspective to address this gap.

The review presented in this chapter has shown the need for research on particular groups of social entrepreneurs, such as women, ethnic minorities and older people. Given that the social entrepreneurs to be researched belong to a particular age group (50+), the following chapter will focus on the age-dimension of this project, drawing on literature related to older people in employment, their engagement in entrepreneurial activity in the private sector, as well as volunteering.

4. Older People and Ageing in Economy and Society

4.1 Introduction

The evidence shows that in developed economies, such as the UK, people are living longer (Eurostat, 2011) and that rising health standards among older people mean that they have the potential to be economically active for longer than before (ONS, 2012). Consequently, the needs of older people have become a matter of increased policy interest in terms of their evolving roles and levels of involvement in society and the economy (Curran and Blackburn, 2001; Walker, 2005).

This chapter examines the concepts of age and ageing and their relevance to SE by providing an overview of the factors relevant to understanding the environment in which OSEs are operating, including their activities, experiences, the barriers they face and their specific needs. It draws on diverse literatures on older people, but with a primary focus on employment and engagement in entrepreneurial and voluntary activity. The social gerontology literature is drawn upon for insights into key aspects important for this study, such as the life course perspective, quality of life and self-identity in old age, as well as age as a social construct.

The literature review is divided into three parts. In the first part, it will be argued that the concept social gerontology provides a useful theoretical framework for the study of OSEs and the reader will be introduced to the key issues in the field. The second part will look at the factors influencing people's work/retirement decisions, with particular reference to older people as workers and entrepreneurs. The final section discusses older people's contributions as volunteers in the unpaid labour force.

4.2 Ageing in Society

What is ageing? While it is generally agreed by researchers, practitioners, policy makers and the general public that ageing is an inevitable part of the life course, there has been considerable disparity in opinions regarding “the definition of old age, the perception of what constitutes normal ageing, and the extent and scope of public/private responsibility for optimal, successful or productive ageing” (Estes *et al.*, 2003: 8). Since its establishment in 1945, the field of gerontology, the science concerned with the study of ageing, has developed into an interdisciplinary subject area, including biology, clinical medicine, as well as the social and behavioural sciences.

In summary, ageing involves the interrelated processes of social, biological and psychological ageing (Stuart-Hamilton, 2000). The diversity of perspectives is mirrored in the disparate body of theory in gerontology, characterised by two main paradigms: the welfare-biomedical approach which centres on biological ageing, and the newer sociological-critical approach from which this study draws in particular. The multidisciplinary field of social gerontology emerged in the 1960s and related theory consists of partial theories on selected aspects of ageing (Estes *et al.*, 2003; Thompson and Thompson, 1996). Rather than viewing age as involving a focus on the end of life, it views ageing and human development as a lifelong process which starts at birth (Riley *et al.*, 1972).

Given the broad scope of the field, this review will focus on four interrelated themes which are most pertinent to the study of OSEs, beginning with an introduction to the life course approach (see e.g. Elder and Giele, 2009; Jamieson, 2002a), and a discussion of the multidimensional phenomenon ‘quality of life’ (QoL) (see e.g. Grundy and Bowling, 1999; Bowling *et al.*, 2002; Walker, 2005). This will be followed by an introduction to the concepts of ‘age and identity’ (see e.g. Estes *et al.*, 2003; Dittmann-Kohli, 2005), as well as critical gerontology (see e.g. Scharf, 2009; Thompson and Thompson, 1996; Walker, 2009). In each case, it will be explained why the approach is of particular relevance to the study of OSEs.

4.2.1 The Life Course Perspective

One perspective in the field of social gerontology is the ‘life course approach’ which has become fundamental to much social scientific research on ageing (Bengtson *et al.*, 2005). The

life course concept refers to “a sequence of socially defined events and roles that the individual enacts over time” (Giele and Elder, 1998: 22) and is summarised by Jamieson (2002a: 11) as follows:

This framework does not specify a particular stage in the life course as the focus. Rather, the focus is on the implications of the passing of time for individuals, on the implications and experience of being at a particular point in time, and the links between earlier and later points in time as well as the links between social structures and individual experiences.

The life course approach also seeks to capture that collective patterns of people’s behavior can have effects on structures, which can be large or small (Riley, 1979), and it is strongly informed by theories on ‘structure and agency’ (discussed in Chapter 2).

The term ‘life course’ has emerged as a more dynamic concept to replace the term ‘life cycle’ which referred to relatively stable patterns of how lives and families are structured over time (‘family cycle’), and which relied on major junctures such as marriage and childbearing. However, the life cycle approach failed to represent the more fluid contemporary patterns of lives which can involve divorce, remarriage or childbearing outside marriage, as well as not representing those who do not get married or have children. The life course perspective, on the other hand, sets out to capture the variability and complexity of real life trajectories (Bengtson *et al.*, 2005; Elder and Giele, 2009).

The life course perspective is defined by five principles which are interrelated in any individual (see Box 4.1). These will be further explored in the context of older people’s SE motivations and activities in Chapters 7.

The life course offers a useful framework for examining people’s values, decision-making and activities in later life. As the fifth principle on ‘ageing and human development’ demonstrates, the life course perspective emphasises that personal identity development is a life-long development. Given that value and identity research has considerably contributed to entrepreneurial motivations research (see Chapters 2 and 3), the following section will present related findings in the ageing context.

Box 4.1: 5 Principles of the Life Course Perspective

- 1.) **Linked Lives:** The first principle “emphasises the interconnectedness of lives, particularly as linked across the generations by bonds of kinship. Lives are embedded in relationships with people and are influenced by them. They are linked over time in relation to changing times, places, and social institutions” (Bengtson *et al.* 2005: 494). For example, if grown up children move out of their family home, parents may have more time for paid or unpaid voluntary work. At the same time, grandparents can decide to opt for early retirement if their grandchildren need their support.
- 2.) **Historical Time and Place:** The second life course principle highlights “the importance of social and historical context in shaping individual lives. Large events such as depressions and wars, or the relative tranquillity or turbulence of a historical period, shape individual psychology, family interactions, and world views. Such historical events and conditions create the opportunities and constraints that circumscribe choices and behaviors and can change the direction of lives”. (Bengtson *et al.* 2005: 493). Similarly, older cohorts may have grown up with different images of old age, which they then turn into reality for themselves (Staudinger, 2005).
- 3.) **Transitions and their Timing:** This principle emphasises “the importance of transitions and their timing relative to the social contexts in which individuals make choices (Bengtson and Allen, 1993; Elder, 1995); the developmental antecedents and consequences of life transitions, events, and behaviour patterns vary according to their timing in a person’s life. There can be a ‘best fit’ in the timing of individual development and family life stage, and their temporal convergence with structural and historically created opportunities (Elder *et al.*, 2003)” (Bengtson *et al.* 2005: 494).
- 4.) **Human Agency:** The fourth principle concerns “agency and the idea that planfulness and effort can affect life outcomes. Lifecourse theory recognizes that individuals are active agents in the construction of their lives. They make choices within the opportunities and constraints provided by family background, stage in the lifecourse, structural arrangements, and historical conditions”. (Bengtson *et al.* 2005: 494)
- 5.) **Ageing and Human Development:** The last principle focuses on “the idea that ageing and human development are life-long processes, and that the relationships, events, and behaviors of earlier life stages have consequences for later life relationships, statuses, and wellbeing. [...] Personal change and continuity are represented by concepts of lifespan development, such as [...] self-identity” (Bengtson *et al.* 2005: 494-5).

Source: Adapted from Bengtson *et al.* (2005: 493-95)

4.2.2 Personality, Identity and Value Orientations over the Life Course

Research has shown the interactive relationship between personality and identity (Ozer and Menet-Martínez, 2006). For instance, work by Helson and Srivastava (2001) shows that “personality traits affect the formation of identity, while at the same time identity both directs and becomes a part of personality” (Ozer and Menet-Martínez, 2006: 407). As both concepts are used for cognitive motivation studies (Dittmann-Kohli, 2005; Ozer and Menet-Martínez, 2006), the role of this section is to demonstrate the relevance of ageing research on personality, identity and value orientation for the study of OSE motivations and SE activities.

Literature on personality and ageing often distinguishes between trait and growth models of personality development (Staudinger, 2005). As discussed in the context of the personality of the entrepreneur in Chapter 2, trait models associate personality with stable traits which, it is argued, are unlikely to change beyond age 30 (e.g. Costa and McCrae, 1994). Growth models, on the other hand, view personality as more fluid, arguing that humans continuously adapt to changing internal and external structural requirements throughout life (e.g. Erikson, 1980). However, Staudinger (2005) points to increasing empirical evidence which shows that personality development is characterised by both stability and change in adulthood as well as old age. Staudinger (2005) offers a more nuanced perspective, involving three main interrelated sources of personality, namely biology, socio-cultural context and the developing person. Each of these “provides opportunities for change as well as constrains personality development into continuity” (Staudinger, 2005: 239).

A related area of research examines value orientations over the life course. As discussed in Chapter 2, within entrepreneurship research, values are often presented as enduring dimensions of individuals’ personality which stabilise in early adulthood (Bardi *et al.*, 2009; Lai, 2011). However, research adopting a life course perspective has shown that value orientations are dynamic and influenced by changing cultural and social environments (Bengtson *et al.* 2005; Roberts and Bengtson, 1999; Lesthaeghe and Moors, 2002; Schwartz, 2007). Other related research has found cohort-effects, i.e. there is evidence for certain value priorities being prominent amongst certain age-cohorts as a result of the influence of the socio-historic context in which these age groups have grown up. Consequently, in ageing research, value orientations have also been identified as being formed by a combination of stability and change (Lesthaeghe and Moors, 2002). As Lesthaeghe and Moors (2002: 30) point out, they “have both an impact on choices and are either strengthened or altered by such decisions”.

The concept of age identity refers to individuals' views on whether they feel younger, older or the same as their true age (Dittmann-Kohli, 2005: 276). Whereas some older people identify with the socially constructed characteristics of advanced age, others look forward to third age as a time full of opportunities and potential new roles (Scase, 1999). According to Dittmann-Kohli (2005: 276), identity (re-)construction is a life-long development "comparable to the (sociological) constructivist task of adapting one's concept of the lifecourse to the changing social environment, and of continuing to adapt one's life story to the growing number of events and experiences in the course of life" (also see Holstein and Gubrium, 2000).

To sum up, whereas much entrepreneurship research on motivations has adopted an approach which focuses on values as static dimensions of personality, the life course approach highlights the dynamic nature of value orientations, identity and lifelong development, and how they interact with past and current structural and contextual factors. Adopting a life course perspective in this study will therefore enable examination of how participants' life circumstances and experiences have influenced their self-conception as older individuals and thereby their SE motivations and activities.

4.2.3 Quality of Life in Old Age

Another related concept of importance for participants' motivations for social entrepreneurial activity is quality of life (QoL) in old age. Research on QoL has a long history in the UK and was a main driver in the creation of the field of social gerontology (Walker and Walker, 2005). It has often been underpinned by the use of health-related indicators to establish levels of QoL in different social groups, such as functional capacity, health status, psychological wellbeing, social support, dependence, coping and adjustment and related research themes such as 'successful ageing', 'positive ageing' and 'healthy ageing' (e.g. Baltes, 1993; Johnson, 1995; Rowe and Kahn, 1997; Walker, 2005). A limitation identified by Walker (2005: 7) is that studies have frequently been undertaken from the researcher's point of view, without enquiring into how older people themselves define their QoL and has, thus, tended to "homogenize older people rather than recognising diversity and differences based, for example, on age, gender, race and ethnicity, and disability". The influence of such factors on QoL is demonstrated by studies of ethnic differences in QoL among older people in Britain (Grewal *et al.*, 2004; Nazroo *et al.*, 2003), which found QoL to be culturally informed. These studies show QoL inequalities between minority and white ethnic groups, as well as variations in the importance of particular elements of QoL between minority ethnic groups. Given the diversity of social entrepreneurs,

findings of this nature indicate a need to recognise heterogeneity, based on age, gender, race/ethnicity etc., when researching this group.

Also relevant are theories concerned with 'quality of society' and social processes (see Walker 2005: 7). The level of social quality within a given context depends on factors such as socio-economic security, social inclusion, social cohesion and social empowerment; factors which are also often discussed in relation to SE. For instance, SE has been presented as offering opportunities for promoting factors such as social inclusion, social cohesion and social empowerment (e.g. Bridge *et al.*, 2009; Defourny, 2001; Seelos and Mair, 2005). The aspect of socio-economic security will be examined in Chapter 7. Given that individuals play an important role in such societal processes and their outcomes, the QoL concept can be related to theories on 'embeddedness' and the relationship between 'structure and agency' discussed in previous chapters.

Bowling (2005) discusses different social (systems) theories of ageing, which have been of importance to research on QoL in old age. An overview of those relevant in relation to OSEs' work/retirement decisions and their motivations for social entrepreneurial activity has been included in Box 4.2. The ways in which QoL related factors feature in the context of participants' motivations for SE activity will be discussed in Chapters 6 and 7.

Walker (2005) draws attention to the important impact of the critical perspective on old age research, especially in social gerontology, which holds that old age is socially constructed and has three critical consequences for QoL research (Walker, 2005: 8):

First, contrary to popular stereotypes, the definitions of good QoL for older people are often similar to those for other age groups (Bond, 1999), although health and functional capacity figure more strongly. [...] Second, as human subjects, older people have a right to determine their own meaning of QoL [and] should be at the centre of the process of measuring and defining QoL. Third, QoL in old age is influenced as much by social and economic factors as by individual and biological characteristics (Walker, 1981). This emphasizes the crucial importance of social structures and culture – race, gender, social class – in determining older people's life experiences and their expectations about what is a good or bad QoL.

Box 4.2: Social (Systems) Theories of Ageing

Social theories of ageing

Activity, or role, theory: maintenance of social roles and activities that are meaningful to people enhance feelings of well-being in older age (Havighurst and Albrecht 1953; Lemon *et al.* 1972).

Continuity theory: individuals make adaptations to enable them to feel the continuity between the past and present, which preserves their psychological well-being (Atchley 1989, 1999).

Social systems theories of ageing

Social exchange theory: the cost-benefit ratio between the individual and society falls out of balance in older age, thus the costs of interacting with older people outweigh the benefits (Dowd 1975).

Modernization theory: with the emergence of new technology, which is seen as undermining the status of older people through the emphasis on education, rather than older adults passing on knowledge and skills, older adults lost their place of prestige and power within the social system (Burgess 1960).

Age stratification theory: there is a socially ascribed age structure to roles, and normative age criteria for certain activities, thus with age a cohort moves to a different set of roles as a younger generation takes its place (Riley *et al.* 1972).

Source: Adapted from Bowling (2005: 3-5)

4.2.4 Critical Gerontology – Ageing as a Social Construction

Given the increasing influence of critical gerontology and its influence on old age research, the following section will look at this approach in more detail and illustrate its relevance for the study of OSEs.

In the tradition of political economy, drawing originally from Marxism (Marx, 1967 [1867-95]), conflict theory (Simmel, 1966 [1904]) and critical theory (Habermas, 1971; Horkheimer and Adorno, 1944), critical gerontology emerged as a concept in social gerontology over the 1980s and 1990s (Phillipson, 2005). Focusing on researching the ‘social construction of age’, it challenged the traditional theories and perspectives in the study of ageing.

According to Estes *et al.* (2003: 2), critical gerontology “examines the structural inequalities that shape the everyday experience of growing old” and responds to three key concerns:

First, the need for a clearer understanding of what various researchers identified as the 'social construction of dependency' in old age. This was seen to have resulted from the development of services associated with the welfare state, from the continued financial impoverishment of a large section of the elderly population, and from the systematic stereotyping of older people [...]. Second was the critique of the biomedical model, a view that associated growing old with physical and mental deterioration and disease. Third was the individualistic focus of traditional gerontology, and the lack of attention to social structure and economic relationships.

Related literature (e.g. Cann and Dean, 2009; Estes *et al.*, 2003; Fealy *et al.* 2012; Featherstone and Hepworth, 2005; Jamieson and Victor, 1997; Walker, 2009) has criticised the tendency to homogenise older people and the related portrayal of the elderly in media, politics and even the academic literature as 'frail, poor, lonely and dependent'. In this context, Thompson and Thompson (1996: 39) draw attention to the 'social division of age':

Old age is constructed around themes such as the sexual division of labour, labour market 'usefulness', citizenship and rights, and the relations of power and inequality which often result in multiple oppression. Rather than being 'cancelled out' by the acquisition of a new label (that is, 'old') other forms of oppression such as sexism, racism and disablism are felt more acutely by the addition of the disempowering effects of age discrimination. Ageist ideology plays a crucial role in the construction of old age, since it prejudices people's image of the older by implying that he or she is inferior by virtue of age.

Consequently, the critical perspective examines age related inequalities in relation to social class (Phillipson, 2005) and, as Thompson and Thompson (1996: 11) point out, "by supposing that the ideal society is one in which individuals have the freedom to construct their own lives, it does not accept that some are freer than others to do so". For example, an estimated 1.8 million pensioners (16%) in the UK officially live in relative poverty, and two thirds of these are women (ONS, 2011a). Critical gerontology has also broadened its spectrum since its emergence in the 1980s to include feminist/gender and ethnic perspectives, as well as globalisation, which have had an increasingly important influence on the concept (Estes *et al.*, 2003; Jamieson *et al.*, 1997; Scharf, 2009; Walker, 2009).

In this context, Mair (2007) and Dressel *et al.* (1997) point out the relevance of the concept of 'intersectionality' to the field of gerontology. The intersectionality framework was first developed by the sociologist Patricia Hill-Collins (Andersen and Hill-Collins, 1998) in the context of feminist theory, to acknowledge how "structural inequalities such as gender, race and class combine in the social world to shape how individuals perceive and experience their lives" (Mair 2007: 1). Dressel *et al.* (1997:579) further argue that recognising the 'intersection' or dynamic interplay of race, class, gender and ageing, and related interlocking oppressions,

can contribute to a better understanding of how “structural factors shape and determine the experience of aging and growing old”. Hence, the concept of intersectionality is also strongly related to the theories on ‘embeddedness’ and ‘structure and agency’ introduced in Chapter 2. Furthermore, critical gerontology has been associated with critical realism (Estes, 2008) which has also been identified as important for this study (see Chapter 5).

As has been shown, critical gerontology highlights the importance of taking into account factors such as gender, race/ethnicity and socio-economic background when researching old age. It can be assumed that, given the diversity of social entrepreneurs, the critical approach will be of considerable significance to this study. It will, for example, be of interest to examine to what extent the QoL of OSEs is a consequence of the social and cultural context of the individuals, as well as how it is influenced by their life course. Critical gerontology is also congruent with theories on ‘embeddedness’ and ‘structure and agency’ and will, therefore, be used as another theoretical lens through which to view the involvement of older people in SE activity. Its applicability will be illustrated in the subsequent sections. Furthermore, as Chapters 6 and 7 will demonstrate, the combination of findings of this study with existing research and theory in the fields of (social) entrepreneurship and social gerontology results in a contribution to theory-building by providing a better understanding of the (social) entrepreneurship process.

4.3 Older People’s Paid Work/Retirement Decisions

As a key aim of this study is to explore how retirement considerations impact on the decision of older people to become involved in SE, this section will provide the necessary background by discussing the factors influencing their decisions on when and how to retire. The review will cover issues such as the role of UK labour market policies, support mechanisms, discrimination and age legislation, as well as the availability of flexible options to extend working lives.

With the establishment of an official retirement age (or state pension ages – SPA), retirement developed into an important life stage, or transition point, in the life course. Green (2009: 52) summarises this established view of retirement as follows:

Traditionally, retirement has been conceptualized as an event, marking the point at which an individual leaves the labor market at the end of his or her working life, with no possibility of return at some later stage.

However, although retirement is still seen by many as a deserved reward for a working life (Green, 2009; Vickerstaff and Loretto, 2007), the concept of retirement has been subject to reconsideration and revision over recent years. According to Marshall and Taylor (2005: 572), “retirement is a socially constructed and evolving institution, and there is no such thing as a ‘normal’ age for retirement”. The so-called ‘tripartite division’ of the life course, consisting of a ‘preparation for work’, a ‘breadwinner’ and a ‘retirement’ stage, which was established after the Second World War, has been criticised widely, particularly for its male-based model, and has been replaced by more complex and individualised life course trails.

Driven by economic and social policy concerns, governments across Europe and beyond are encouraging older workers to stay in the labour market for longer and to delay their retirement (Manthorpe and Chiva, 2009; Muller-Camen *et al.*, 2011; OECD, 2006). Nevertheless, although governments in general do not see early retirement as a sustainable option anymore, early retirement remains popular among older workers (Sargeant, 2011). Labour market participation declines with age, with one marked drop at State Pension Age (SPA - at age 65), and another one when women and men reach their late 50s (DWP, 2011). Table 4.3 shows male and female employment rates since 1997.

Table 4.1: Employment Rates in the UK Labour Market (by age and gender)

Employment Rates in the UK Labour Market (by Age and Gender)						
	Male			Female		
	<u>1992</u>	<u>2001</u>	<u>2011</u>	<u>1992</u>	<u>2001</u>	<u>2011</u>
16-64	76.4%	79.0%	75.5%	61.9%	66.1%	65.3%
16-24	63.2%	63.8%	51.1%	59.7%	59.3%	49.2%
25-49	85.6%	88.1%	86.3%	69.1%	74.0%	74.0%
50-64	66.0%	69.9%	71.1%	47.4%	54.3%	59.2%
65+	8.6%	7.2%	11.9%	3.6%	3.1%	6.3%

Source: DWP – Older Workers Statistical Information Booklet. Quarter Two, 2011.

The drop in employment rates among people over 50 is due to a number of factors, such as previous policies to encourage older workers to leave the labour market early (Walker, 2005). Research on older people’s retirement decisions suggests a preference to be able to make informed choices about when and if to retire (Brown and Vickerstaff, 2011; Vickerstaff, 2006). However, older people do not always retire voluntarily and often leave the labour force in different ways, including early and partial retirement, redundancy, unemployment, disability etc. The reasons for low employment rates among older people are complex and depend on a

combination of so called ‘push’ and ‘pull’ factors. Push factors include age discrimination, caring responsibilities, health problems, and the lack of more attractive and flexible employment options for older workers; pull factors include financial security and the perception of retirement as an ‘earned reward’ (Danson and Gilmore, 2012; Flynn and McNair, 2009; Fraser *et al.*, 2009; Platman, 2004). In addition, these factors interact with structural factors such as gender, ethnicity and class, as discussed in the context of intersectionality in Section 4.2.4.

According to Flynn and McNair (2009: 31), little is known about how older workers’ views on their employment influence their expectations for work after retirement. They found five factors to be significant in the decision of older workers to remain in paid employment longer, namely job satisfaction, work-life balance, financial considerations such as pensions and benefits, and an expectation that work would be missed in retirement. Fraser *et al.* (2009) draw attention to the additional non-monetary advantages of remaining in paid employment for longer. As research has shown, these benefits include social engagement, keeping self-esteem and self-concept, as well as a sense of daily routine and structure (Bambrick and Bonder, 2005; Moyers and Coleman, 2004). These factors are strongly related to an individual’s well-being and their QoL, as discussed earlier in this chapter. Nevertheless, the extent to which they feature or are available in somebody’s life depends on individual circumstances.

4.3.1 The Role of UK Policies, Discrimination and Support

Older people’s routes into retirement are a complex issue, with work/retirement opportunities providing an important part of context for OSEs and having a particular influence on SE motivations. This section therefore discusses how and to what extent decisions to remain in or leave the labour force, as well as whether to become involved in SE, are also influenced by factors such as UK employment policies, anti-ageism legislation and support programmes.

In the UK, policy on older workers has focused on increasing labour market participation either by encouraging those unemployed or inactive back into work or by encouraging people to work up to and beyond retirement age (Barrell *et al.*, 2012; Muller-Camen *et al.*, 2011; Platman, 2004; Vickerstaff, 2006; Walkers and Maltby, 2012; Weyman *et al.*, 2012). The coalition government started phasing out the default retirement age from 2011 and unjustified

fixed retirement ages are now unlawful (DWP, 2012²⁴). However, given the demographic trends outlined earlier in this paper, it is quite surprising that policy making on age and employment is still in its infancy (Grattan 2009), and that there are currently few support programmes directly aimed at older workers.

‘New Deal 50 plus’ used to be a support programme offering advice for people over 50 to find work. It was presented as a ‘ground-breaking’ welfare to work programme when introduced by the New Labour Government in 1999 (Grattan, 2009). In order to qualify for this initiative, the applicant needed to have been unemployed and on benefits for at least six months (Lissenburgh and Smeaton, 2003). As part of the coalition government’s welfare reform, it was replaced by the unified ‘Work Programme’ in June 2011, which does not focus on particular age groups (DWP, 2012). Nevertheless, it aims to support those who are more at risk of long-term unemployment and therefore indirectly addresses older people. Given that the programme is still very young, its results and effectiveness are still unknown.

‘Age Positive’ is a scheme run by the DWP in collaboration with BusinessLink, focused on advising employers on the opportunities and challenges of the ageing workforce (Businesslink website²⁵). It “provides guidance for employers and business leaders setting out the business benefits of recruiting, retaining and training older workers, effective age management practices and the removal of the fixed retirement age” (DWP website²⁶). Another support programme aimed at older people, PRIME, provides self-employment support, and will be discussed in the context of older entrepreneurship in Section 4.3.3. Participants’ experiences with these support programmes will be examined in Chapter 6.

Despite some change in attitudes and the growth of support, ageism remains an important factor influencing older people’s employment opportunities. As in other European countries, in the UK there is considerable research evidence for the existence of deeply rooted age discrimination in the workplace, manifested in all stages of the employment process (Sargeant, 1999; 2011; Muller-Camen *et al.*, 2011; Porcellato *et al.*, 2010; Sweiry and Willits, 2012). Research in the UK has found that older workers are more likely to be made redundant than their younger counterparts (except for the under 25 age group) and that, once unemployed, they find it harder to get back into employment (Lissenburgh and Smeaton, 2003). Over 40% of unemployed people aged 50-64 have been so for 12 months or longer (compared with 38% of

²⁴ <http://www.dwp.gov.uk/policy/ageing-society/managing-without-fixed-retirement/>.

²⁵ <http://www.businesslink.gov.uk/>.

²⁶ <http://www.dwp.gov.uk/policy/ageing-society/managing-without-fixed-retirement/>.

those aged 25-49 and 25% of those aged 16-24) (DWP, 2011). Furthermore, case study research conducted in selected UK workplaces found that “loyal, long-serving employees were seen as vulnerable, expendable and out-of-place” (Platman, 2004: 575). While the experience of older people is valued, it can also contribute to perceptions of inflexibility and “out-dated ideas” (Sorensen and Stuart, 2000). As research by Porcellato *et al.* (2010) showed, whereas skills gained through experience were seen as an invaluable quality by interviewees²⁷, the significance of experience was largely ignored by employers.

In 2000, the UK Government responded to the problem of age discrimination by agreeing to an EU Equal Treatment Directive on race, disability, age, religion/belief and sexual orientation. UK age legislation, outlawing discrimination in employment and vocational training, has been in force since late 2006 (*The Employment Equality (Age) Regulations 2006* Statutory Instrument 2006 No. 1031). Although the introduction of the legislation has led to a high level of public interest and helped raising awareness, it has mainly been the larger employers who have adjusted their human resource management policies. As Grattan (2009: 101) points out, age legislation, as with other equalities acts, is not a ‘magic potion’ and, as research has shown, many smaller firms are not even aware that such legislation exists. Furthermore, although employers are encouraged to act on the new regulations, the framework gives them a lot of freedom as to how they translate it into more flexible retirement options.

In their study of flexible retirement options, Danson and Gilmore (2012) found that the right to ask to work beyond state pension age (Employment Equality (Age) Regulations, 2006) had not led to significant changes in the age profile of staff over the last five years. Although employers were found to have taken initial steps in order to respond to the abolition of the default retirement age, only a small number had proactively discussed longer career plans with their staff. Similarly, Taylor (2002) draws attention to the fact that the abolition of mandatory retirement in other countries (e.g. Australia, USA) appears to have had little impact on patterns of retirement. As Danson and Gilmore (2012) point out, previous changes in legislation had shown that more tangible results will probably not become apparent for some time.

In any case, early retirement is still popular among older workers (see Table 4.3) and employers keep finding other ways of dismissing or retiring older employees. According to Sargeant (2011; 1999: 7), one example can be seen in voluntary redundancy measures, which

²⁷ The study involved interviews in conjunction with occupational-event calendars with 56 individuals in North West England.

are “in practice targeted at older workers, in order to avoid compulsory redundancies spread across all age groups”. He argues that early retirement policies are an example of indirect discrimination:

Early retirement policies are a means of encouraging older workers to exit the workforce. It is possible to argue that this is a voluntary process and that, often, workers will volunteer for early retirement. It is also possible to argue that early retirement policies are a manifestation of how age discrimination has become an acceptable method of reducing the size of a workforce. It is older workers who qualify for early retirement and who, often with the agreement of the trade unions, are selected for exiting purely because of their chronological age. It is an example of indirect discrimination, which has its major impact on older workers. (p. 6)

In their review of recent research on older people’s employment in the UK, Loretto *et al.* (2013) found that age discrimination legislation has so far had a moderate influence on individuals’ employment decisions, and on employers’ attitudes and behaviours (see also Beck, 2013). Thus, although a step in the right direction, experience of other countries shows that it will take time and the right support and initiatives to achieve maximum impact of the legislation.

Consequently, despite the UK government’s ‘extending working lives’ policy agenda, in practice opportunities for those older workers who wish to do so remain limited. Furthermore, as a previous study by Vickerstaff and Loretto (2007) suggests, it can be expected that there will be little change to existing class and gender differences in the extent to which individuals have a choice regarding when and how to retire. Of particular relevance to this study is how retirement considerations influence the decisions of older people to become involved in SE. This issue will therefore be covered in relation to SE motivations in Chapter 7.

4.3.2 Flexible Working

As has been pointed out at the beginning of this section, another factor that has been identified as important in influencing work/retirement decisions is the availability and affordability of flexible working options which will now be discussed in more detail.

Since the early 1980s, the increasingly flexible labour market has often been presented by academics and policy makers as providing considerable opportunities for older people to extend their working lives (e.g. Flynn, 2008; Lain, 2012; Maltby, 2011; Platman, 2004). It is suggested that people should move away from the ‘cliff edge’ approach to retirement (the

sudden move from full-time work to full-time retirement) by adopting a more gradual approach (Flynn and McNair, 2009; Green, 2009). In this context, ‘bridging jobs’, often involving less responsibility and fewer hours, have been advocated as a smoother transition to retirement (Flynn and McNair, 2009; Lissenburgh and Smeaton, 2003; Smeaton *et al.*, 2009).

Evidence from the National Statistics Omnibus Survey²⁸ shows that 80% of older worker respondents would like to be in paid work after retiring from their main jobs. However, most of them would also like to work on a flexible or part-time basis²⁹, or see any involvement in paid work as dependent on the availability of flexible options (Flynn and McNair, 2009). This provides evidence for the high interest in the gradual retirement approach among older workers.

According to Vickerstaff (2006: 150), increased choice and flexibility regarding retirement would enable older people, who might otherwise be prone to leave the workforce, to continue working. She points out that flexible working “enables people to manage health conditions, balance caring responsibilities, and achieve a smooth transition into an active retirement by allowing the pursuit of other activities alongside working”. The availability of flexible working options therefore also has an impact on people’s QoL in old age, as discussed in Section 4.2.3.

Also relevant to this study is the concept of ‘downshifting’, a social trend by which (although spread across all social groups) often high earning individuals seek a less pressured and materially intensive lifestyle. As Hamilton (2003: 6) points out, many terms have been used to refer to ‘downshifting’, but they all focus on “the idea of a *voluntary* choice by individuals to change aspects of their lives in order to create a simpler lifestyle”. The decision to downshift is often based on individuals’ reflections on ‘the meaning of life’ (Levy, 2005) or their ‘pursuit of happiness’ (Hamilton, 2003) and, hence, based on people’s wish to improve their QoL.

In his study of the extent and nature of downshifting in the UK, Hamilton (2003) found three main forms: reducing working hours, stopping work altogether and changing careers. Less frequent ways of downshifting include changing to a lower-paying job and returning to study. Women downshifters were found to be more likely than men to stop paid work or reduce their

²⁸ The Office for National Statistics carries out the Omnibus Survey, a multi-purpose survey based on interviews with a sample of about 1,800 adults per survey month, with one adult selected from each household. Over 300 question modules have been included to date covering a very wide range of subject areas. See <http://www.statistics.gov.uk/statbase/Source.asp?vlnk=657andMore=Y>.

²⁹ “A quarter said that they would definitely want to continue in work; another quarter said they would probably like to do so; and a further 20 per cent said that they might ‘if the right job came along’” (Flynn and McNair 2009: 30).

hours, while men are more likely to change careers or to a lower-paying job. Reasons for downshifting in the older age group (50-59) were: 'healthier lifestyle' (25%); 'more time with family' (19%); 'more control and personal fulfilment' (14%); 'less materialistic lifestyle' (10%); 'more balanced lifestyle' (7%); 'more financial independence' (2%); 'none of these/don't know' (24%).

However, in their study of older workers' employment preferences, Smeaton *et al.* (2009) found that the availability of downshifting options within existing employment was limited. One fifth of men and women in their sample wanted to downshift by reducing levels of responsibility and were not given the opportunity to do so. Smeaton *et al.* (2009) also draw attention to the fact that not all older workers want to reduce levels of involvement and responsibility, finding that double the proportion of participants who had articulated their interest in downshifting had expressed their wish to be promoted and to increase their level of responsibility, despite such opportunities also being blocked.

The choices older people make regarding flexible working patterns often "reflect their gender, job class, education and attitudes" (Flynn and McNair, 2009: 26). Lissenburgh and Smeaton (2003) found that better qualified employees were in a better position to find 'good quality' flexible employment or to become self-employed, whereas those with no or poor qualifications tended to end up in low paid and low quality flexible employment. In 2011, around two-thirds (66%) of workers over SPA in the UK were working part-time (ONS, 2012). Of these 1.4 million older workers, 39% were men and 61% were women. However, whereas two-thirds of men in this group were in jobs classified as higher skilled, almost two-thirds of women could be found in jobs classified as lower skilled. These findings highlight the relevance of critical gerontology, discussed earlier in this chapter.

Despite its important role in older people's retirement decisions, in reality the availability or take-up of flexible working patterns for the over 50s age group has been limited, often due to institutional and/or financial barriers. Vickerstaff (2006: 7) found that individuals thought their job was not do-able on a part-time basis, felt it was difficult to find someone to job-share with, or did not like the idea of 'feeling sidelined' and the 'diminution of status' as a consequence of reducing hours. However, the main reasons given were of a financial nature; people needed the full-time wage or salary up to retirement and thought that reducing hours would have a negative effect on their pension entitlements. At the same time, as Danson and Gilmore (2012) found in their study of flexible retirement options, although there was a common understanding of the benefits that more flexible employment and staged retirement could

have for all stakeholders, the managerial challenges that such arrangements posed were seen as major constraints.

To sum up, despite the recognition of the need to provide an infrastructure that allows older workers to leave the labour market when and how they want to, depending on individual circumstances, in reality attractive flexible working options are currently limited. It is in this context that this study explores the potential of SE to provide more flexible opportunities for older people to transition to retirement.

4.4 Older Entrepreneurship

Self-employment is another important context in which flexible working options have been discussed and which is of high relevance to the study of OSEs. It will therefore be dealt with in more depth in this section.

Entrepreneurship has been identified as having considerable potential as a vehicle for increasing older workers' economic longevity (Akola, 2008; Gray, 2007; Morris and Mallier, 2003; Weber and Schaper, 2003). Policy makers have promoted self-employment among older age groups as a means to tackle unemployment and to reduce the high demands on welfare caused by having a higher proportion of older people in the population (Curran and Blackburn, 2001). It has been suggested that through self-employment, older workers can enjoy the opportunity to work flexibly and phase into retirement (Lissenburgh and Smeaton, 2003; Smeaton *et al.*, 2009), choosing which job opportunities to take. However, it has to be recognised that entrepreneurial activity spans a wide spectrum, and, whereas mainly discussed in an economic context in this section, it can also include voluntary activity, as will be discussed in Section 4.5.

According to Curran and Blackburn (2001) the perception in the UK that people over 50 might provide a useful pool of potential entrepreneurs is based on three questionable assumptions. The first relates to Scase's (1999) presentation of older people as a new generation of energetic individuals who are looking forward to third age as a time full of opportunities and chances to get involved in new roles rather than, as previously, a time to gradually remove themselves socially and economically. The second assumption relates to the view that older people are more likely to have access to finance required for business start-up, and the third that older people are increasingly in good health and living longer.

Older entrepreneurs are also thought to have advantages over younger counterparts in terms of experience, human and social capital, as well as specialised skills (Johnson, 2005; Sorensen and Stuart, 2000; Kautonen *et al.*, 2008, 2010; Singh and DeNoble, 2003). Research on mainstream enterprise suggests that start-ups by people aged 50-55 have twice as much chance of survival than those started by 20-25 year olds (Storey, 1994). According to the GEM (Harding, 2006) study, this is also true for older social entrepreneurs (over 55s), who are most likely to be running an established (active for longer than 42 months) social enterprise.

Although workers over state pension age are far more likely to be self-employed (32%) than their younger counterparts (13%) (ONS, 2012), recent evidence from GEM shows that nascent entrepreneurship and new business activity (TEA³⁰) declines with age, with those aged 55-64 being least likely to become involved in entrepreneurial activity at this stage of their lives (see Table 4.2) (Levie and Hart, 2012).

Table 4.2: Total early-stage Entrepreneurial Activity in the UK in 2011

Age Group	18-24	25-34	35-44	45-54	55-64
%	6.2	9.4	8.7	7.5	5.5

Source: Levie and Hart (2012: 44) - Global Entrepreneurship Monitor UK 2011

It is also the case that more than twice as many older men are self-employed than older women. In 2011, the rate of TEA in the UK was 10.2% for men and 5% for women (of the population aged 18-64) (Levie and Hart, 2012). Although the lessening of family obligations at an older age suggests increasing entrepreneurial potential among older women, Kautonen (2008: 10) argues that part of the reason for older age not having the expected impact on the entrepreneurial behavior of women is the traditionally lower levels of involvement of women of that generation in careers outside the home. This perspective can be criticised, however, for failing to consider the fact that responsibilities to care for their own children are often replaced by obligations to care for grandchildren and elderly partners or other family members and friends (Smeaton *et al.*, 2009; Walker and Webster, 2007).

Given these findings, it is surprising that, despite the fact that entrepreneurship is increasingly seen as a form of transition, a 'bridge' between a steady career job and retirement (Smeaton

³⁰ Levie and Hart (2012:4) define total early stage entrepreneurial activity as "the sum of the nascent entrepreneurship rate and the new business owner-manager rate – without double counting".

et al., 2009), there are currently only few enterprise support programmes directly aimed at older workers. The most substantial programme in the UK is the PRIME initiative which seeks to help over 50s to set up and run their own business (PRIME, 2007; Kautonen *et al.*, 2008). PRIME is a registered charity, linked to Age UK, aimed at tackling unemployment and social exclusion among people over 50, by providing support, particularly to individuals with little access to finance.

Although often presented as “an effective way to sidestep discrimination and keep earning a livelihood”, it has to be recognised that self-employment is “not the right route for everybody” over 50 (PRIME 2007: 4). In an exploratory study³¹, Curran and Blackburn (2001: 898) examined older people’s interest in self-employment and found only a moderate level of interest among the 50 to 75 age group:

Only 7 per cent of the 463 people responding were already self-employed. Among those already retired or not in paid employment few (under 4 per cent) stated they would like to be self-employed. Amongst those still in paid employment, more would like to work for themselves but the proportion was not – at under 15 per cent – exceptionally high.

In line with earlier research, less than a third of those expressing interest in self-employment actually become self-employed. The study also found that one reason for not considering self-employment was satisfaction with current employment. Other reasons of those in employment included the risks and insecurities of self-employment, low incomes, feelings of being ‘too old’, that it would involve working too many hours, the feeling that they had too little knowledge to run a business and related concerns regarding the everyday problems of running a business such as cash flow management or finding customers. Curran and Blackburn (2001) speculate that the reluctance to consider self-employment may also be related to the fact that most of the sample worked for medium or larger enterprises. They point out that previous research (Storey, 1994) has shown a link between the size of the current employing organisation and the tendencies to consider self-employment. For example, work experiences in larger organisations are often based on narrowly defined work roles which are “less likely to develop the ‘jack of all trades’ flexible skills needed to run a small enterprise” (Curran and Blackburn, 2001: 895). In any case, Curran and Blackburn’s (2001) findings suggest that the government’s aspiration to increase self-employment or small-business ownership among

³¹ One thousand people were selected randomly from a sampling frame of 5,000 individuals throughout the UK between 50 and 75 provided by Experian and sent a questionnaire. 463 usable replies were received (response rate of just under 47 per cent); the female response level was higher than the known demographic imbalance.

older people as a means to significantly increase labour market participation may be over-optimistic.

As pointed out above, the view that people over 50 might provide a useful pool of potential entrepreneurs is partly based on the argument that they have better access to finance than other age groups (Curran and Blackburn, 2001). This claim is supported by the findings of Hart *et al.* (2004) that 'third age' (50-64) individuals in the top one third of household income were twice as likely to be entrepreneurially active than other income groups of the same age, and of Kautonen *et al.* (2008) that the level of entrepreneurial activity was considerably higher than in the equivalent 'prime age' (20-49) group.

Nevertheless, this is not valid for all 'third age' groups. As Kautonen *et al.* (2008) point out, the situation is different if looking at the main target group for the PRIME initiative, namely workless older people below SPA. In their study of retirement behavior of British self-employed workers³², Parker and Rougier (2007: 697) found that those few employees who switch to self-employment in later life were less likely to be motivated by "attempts to use self-employment as a bridge job or 'stepping stone' to full retirement, than by self-employment being a last resort for less affluent workers with job histories of weak attachment to the labour market". Furthermore, Singh and DeNoble (2003) emphasise that many prefer to reserve wealth accumulated throughout a career to cover costs of living in retirement, rather than investing in a business start-up without guaranteed returns. According to Lévesque and Minniti (2006: 177), individuals' decision to become self-employed is based on "the dynamic interplay of age, wealth and risk aversion". After people have reached a certain threshold age, their willingness to start a new business declines, as having to invest time without the prospect of immediate profits appears too risky.

Little is currently known about older people's risk taking propensity and related research findings have been inconclusive. Whereas some suggest that the risk averseness of older people is one reason why they are less likely to set up their own business than their younger counterparts (Curran and Blackburn, 2001; Lévesque and Minniti, 2006), a study by NESTA³³ (Bedell and Young, 2009) found no evidence for older people being less willing to risk than

³² The study was based on data from the two-wave (1988/89 and 1994) British Retirement Survey.

³³ NESTA describe themselves as "an independent charity with a mission to help people and organisations bring great ideas to life". They invest in early-stage companies by providing investments and grants, research, networks and skills. For more details, see http://www.nesta.org.uk/about_us.

younger people. In this context, Chapter 7 will provide important insights into OSEs' changing risk taking propensity over time in their lives.

As most of the current discourse is based on limited empirical evidence, there is a need for further research to explore why the older age group, even if more likely than younger age groups to be self-employed, does not opt for self-employment at older age more often. This study is particularly interested in examining the potential role of SE, especially given the trend towards downshifting and the fact that related flexible working options are currently of limited availability, SE might allow individuals with business know-how and experience to switch to fields of activity that they value more highly, do something good for society and/or the environment, and at the same time enjoy the prestige and independence often associated with self-employment. The potential of this idea is supported by Levie and Hart's (2011) research which found that, whereas those in the 45-54 age group are still more likely to be involved in 'mainstream' entrepreneurship (22.5%) than in SE (19.4%), the 55-64 age group is more likely to be involved in social (13.2%) than in 'mainstream' (11.6%) entrepreneurship. This suggests that some in the older age group have recognised the potential that SE provides as a transition to retirement.

4.5 Older People and Voluntary Work

Given that one of the aims of this study is to investigate why participants chose to become involved in SE and whether it could provide an alternative to, or 'middle way' between entrepreneurship and volunteering, this section examines those who are often forgotten in the discourse on older workers: older volunteers.

Older people are often perceived and presented as 'a problem', as 'having nothing to contribute' and as an 'economic burden to society' (Cann and Dean, 2009; Kalache *et al.*, 2005; Bond *et al.*, 1993; Johnson, 2005). In reality, they make a considerable contribution to their families, their communities and even society at large. Older people are frequently involved in activities which are neglected in economic figures and make substantial contributions in the unpaid labour force, as carers (Mooney *et al.*, 2002; Chappell and Penning, 2005; Smeaton *et al.*, 2009) or volunteers (Hattan-Yeo, 2006; Kalache *et al.*, 2005; ONS, 2010b; Phillipson, 2005).

However, given that most people's life expectancy keeps increasing without a simultaneous extension to working lives, today's older population spends considerably more time in

retirement than previous generations. In this context, older people have been recognised as a promising pool of volunteers, as also reflected in the coalition government's call for increased civic engagement (Cabinet Office, 2010a and b).

Volunteering can be defined as "unpaid work provided to parties to whom the worker owes no contractual, familiar, or friendship obligations" (Wilson and Muswick, 1997: 694). Although in recent years volunteering has seen an increasing participation of groups with lower levels of voluntary activity, such as the unemployed, older people and those from an ethnic minority background, middle-aged, highly educated and altruistically motivated women are still providing the core of voluntary activity (Wardell *et al.*, 2000; Mohan, 2011).

The Citizenship Survey 2008-09 (ONS, 2009b) shows that 29% of people in the 50-64 age group, 26% in the 65+ age group, and 21% of those aged 75+ in the UK are involved in regular (at least once a month) formal volunteering, with women more likely to volunteer than men. Volunteers over 50 were most likely to get involved in the following six areas (ONS, 2010b³⁴):

1. Religion (44% for 50+; 50% for 75+)
2. Hobbies, recreation/arts/social clubs (43%)
3. Sport/exercise (taking part or going to watch) (38% for 50+; 27% for 75+),
4. Local community or neighbourhood groups (31%)
5. Health, disability and social welfare (29%)
6. The elderly (28% for 50+; 38% for 75+)

As the numbers show, with increasing age, 50+ volunteers were more likely to help organisations related to religion and the elderly, and less likely to volunteer in the area of sport/exercise. It will be of interest to explore how these areas of activity compare to those of OSEs.

Research by Rochester and Thomas (2006) has shown that older volunteers were valued for the following reasons: being more committed than their younger counterparts, likely to stay longer, putting in more hours, having more experience and skills, being prepared to be more flexible and versatile, and as having a rapport with older service users or beneficiaries.

Main routes for people to find out about volunteering opportunities in their organisation were through someone else already involved in the group, word of mouth or place of worship.

³⁴ Percentages sum to more than 100 because respondents could mention more than one type of organisation.

Amongst the 50+ age groups, the following five motivations for regular formal volunteering were reported most frequently (ONS, 2010b):

1. I want to improve things/help people
2. The cause was really important to me
3. I had spare time to do it
4. I wanted to meet people/make friends
5. It's part of my philosophy of life to help people

However, as Blank (2012) points out, the main motive can often not be identified, as voluntary activity is the result of multiple motivations which consist of a combination of altruistic and egoistic elements (Moschner, 2002). Like others (e.g. Smith and Gay, 2005), Wardell *et al.* (2000: 247) also found that “older people use their volunteering as a ‘tool’ to adjust to their retirement”, to overcome social isolation and as a way of gaining new and local social contact. They want to contribute to a good cause, and retain a sense of social worth and relevance (Amin, 2009). The importance of social integration, which is defined by George (2005: 298) as “the extent to which individuals maintain meaningful ties to social structure via social roles and a variety of forms of civic participation”, is often mentioned in this context. For example, there is some research evidence for the positive effects of volunteering on health (George, 2005). At the same time, as pointed out by Butler (2005:547), “healthy older persons are more apt to remain productively engaged in society in their old age through continuing work or voluntary activity” and, hence, to make useful contributions to the economy and/or society.

Thomése *et al.* (2005) also draw attention to the significance of establishing and maintaining networks in later life and mention the advantages volunteering offers in order to gain future access to different resources. Drawing on work by Baum and Ziersch (2003), they point out that “personal networks of friends, kin and neighbours may provide support, whereas relationships within formal networks, such as voluntary organizations, may provide useful information, or access to jobs and other networks” (Thomése *et al.*, 2005: 466).

However, although the ways in which volunteering can contribute to a better QoL in older age have been recognised, research has shown that people usually do not begin their volunteering in later life (Erlinghagen and Hank, 2006). Older volunteers therefore tend to be previous volunteers who have aged, and attracting ‘new’ volunteers has proven to be difficult (Smith and Gay, 2005).

Nevertheless, there is a need to recognise that individual contexts differ and that not everybody can afford to give lots of free time. As Erlinghagen and Hank (2005: 13) point out:

It is therefore crucial to always keep in mind the beneficial aspect of volunteering for those who volunteer: older people shall not be 'exploited' for the benefit of others, but will hopefully experience a higher quality of life themselves through their active participation in society.

As Mohan (2011) points out, depending on how volunteering is defined, a narrow conception may fail to acknowledge the contributions that people make in other spheres of social life. An example of growing importance in this respect is care. Many people in their fifties and sixties combine paid work with care giving, for example, for their partners, young grandchildren or elderly relatives (Mooney *et al.*, 2002).

Of particular interest to this study is how older people's motivations, expectations and contributions related to volunteering compare to those of OSEs. Chapter 7 will therefore examine these factors and also explore the role of SE in providing a 'middle way' between volunteering and entrepreneurship.

4.6 Conclusion

The aim of this chapter has been to explore the age dimension and its relevance to SE. In order to get a more comprehensive understanding of older people and their activities, social gerontology, the study of ageing in a social context, has been identified as important for this study. The life course perspective has been identified as a particularly important approach for studying OSEs, facilitating the examination of how participants' past and present life circumstances and experiences have influenced their SE motivations and activities. Whereas entrepreneurship research has examined motivations using an approach which focuses on values as static dimensions of personality, life course research on values emphasises the dynamic nature of value orientations and their lifelong development in interaction with past and current structural and contextual factors. In addition, the concept of critical gerontology is of considerable significance to this study, as it complements theories on 'embeddedness' and 'structure and agency' which were introduced in Chapter 2, particularly with its emphasis on the socially constructed nature of ageing.

Given the current dearth of literature on OSEs, this review has drawn on literature related to older people in employment, engaged in entrepreneurial activity in the private sector and also volunteering. All these aspects are relevant to understanding today's older population, the decisions older people make and the choices they have in relation to work in later life, particularly about when and how to retire. In addition, these factors provide the context in which to understand older people's decisions to become involved in SE.

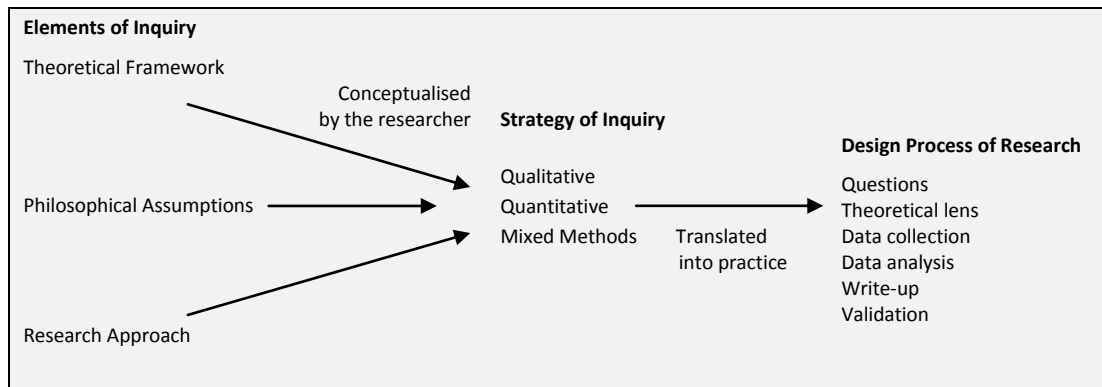
Although flexible working arrangements are seen as of increasing importance in relation to the decision of when to retire, at the moment such options are limited. Entrepreneurship has been suggested as another possible route for transitioning into retirement, but take up of this idea has been low. At the same time, older people are strongly represented in volunteering. It is therefore of interest to examine the role that SE plays in this context. As has been suggested, SE could be particularly suited as a form of transition, or 'bridge' between a steady career job and retirement, and provide an alternative to or 'middle way' between 'mainstream' entrepreneurship and voluntary work. Especially given the trend towards downshifting, SE might allow individuals to switch to fields of activity that they value more highly, do something good for society and/or the environment, enjoy a better QoL and, at the same time, the prestige and independence often associated with self-employment.

The following chapter will present the methodology adopted to tackle the research questions which have been formulated based on the insights gained and gaps in knowledge identified in the literature review.

5. Research Methodology

This chapter presents the rationale behind the methodology employed in this study and the different stages involved in the research process. In order to illustrate how the decisions that had to be made as part of the research design process were interrelated, Creswell's (2003) framework of research design³⁵ has been adapted by the researcher to reflect the terminology used in this chapter (see Figure 5.1 below).

Figure .: Summary Model: Design Process of Research



Source: Adapted from Creswell (2003: 5)

The following section begins by summarising those theories identified in the literature review which have been identified as most appropriate for providing the theoretical foundation for this project. Second, the philosophical assumptions and the research approach underlying this study will be presented, as informed by the theoretical framework. Third, the most appropriate research strategy, methods as well as the process of data collection and analysis will be outlined, including a justification for the choice of the particular approaches and methods adopted. Fourth, the validity and generalisability of the study, as well as some limitations, will be discussed. Finally, the issue of ethical considerations is addressed.

³⁵ This framework is based on a model of research design provided by Crotty (1998).

5.1 Conceptual Framework

5.1.1 Researching Older Social Entrepreneurs

In the previous sections, social entrepreneurs have been identified as a highly diverse group in terms of age, gender, ethnicity and social background. However, despite the increased interest of academics, policy makers and practitioners in the issues surrounding SE, little empirical evidence currently exists regarding the characteristics of different groups of social entrepreneurs, and commonalities/differences in their motivations, the types of activity they are involved in, or the challenges and barriers they face. Consequently, social entrepreneurial behaviour remains poorly understood. There is, therefore, an urgent need for research which focuses on the specific experiences, operating contexts and needs of particular groups of social entrepreneurs.

This UK based study is focused on researching 'older' social entrepreneurs. As part of the review of relevant existing literature, gaps in knowledge and issues needing further investigation were identified. Thus, in Chapter 1, three sets of research questions were set out:

I. Who are 50+ Social Entrepreneurs?

What are their main demographic characteristics (gender, race/ethnicity, social/educational background)?

II. What is the role of people over 50 in SE and what is the nature of their social entrepreneurial activity?

What do they do? How do they operate? How do they define the nature of their activity (e.g. voluntary activity, community activism, SE)?

III. What motivates OSEs and how do these motivations feed into the SE process?

How and why did they become involved in SE? How do their motivations shape the SE process? How is their motivation related to their age/life stage?

The following two sections draw together the main concepts and theories which based were identified in the literature review as most appropriate to support and inform this research project.

5.1.2 The Dynamic Relationship of ‘Structure’ and ‘Agency’

It was concluded from the literature review that the limited understanding of the (social) entrepreneurship process is due to the partial nature of the theoretical approaches that dominate the field. As has been argued, the focus on theoretical elements and approaches that present (social) entrepreneurs as ‘heroic’ individuals has considerably delayed theory-building in (social) entrepreneurship, with scholars only more recently starting to acknowledge the diversity of social entrepreneurs, and SE as a collective phenomenon. Moreover, in order to obtain an understanding of the diverse needs of different groups of social entrepreneurs, research needs to consider the influence of wider socio-economic factors and cultural backgrounds on their SE activity.

There currently is a dearth of knowledge on OSEs, although some prior research indicates their diversity in terms of gender, race/ethnicity and educational background. This study contributes to understanding by examining the diversity of OSEs and the different ways in which their actions are embedded. In this context, theories on ‘embeddedness’ and the relationship between ‘structure and agency’ have been adopted as a useful lens through which to view entrepreneurship. These approaches help to understand the entrepreneur as situated within and influenced by a range of structural influences which both enable and constrain entrepreneurs in their ability to act, or to discover, assess and exploit opportunities. Moreover, although individuals are born into existing structures, they also have the potential to transform them through their actions.

5.1.3 The Age-dimension of Social Entrepreneurial Activity

Given the focus on social entrepreneurs of a particular age group (50+), there is a need to consider theories which capture the age dimension of this project. The issue of ‘age’ and ‘ageing’ has been approached from the perspective of social gerontology, the study of ageing in a social context, and it has been argued that aspects such as quality of life in old age, age identity and age as a social construct are of particular importance for this project.

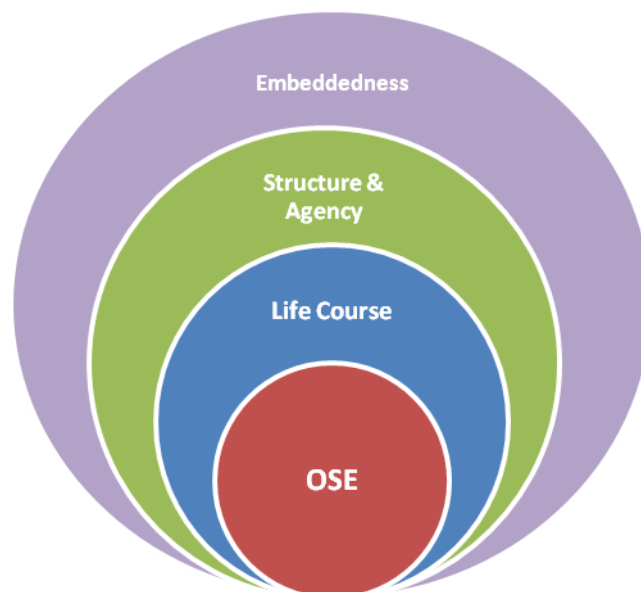
Riley and Riley (1999: 123) define the ‘sociology of age’ as being concerned with “(1) people over their life course; (2) age-related social structures and institutions, and (3) the dynamic interplay between people and structures *as each influences the other*”. Social gerontology also aims at understanding “*individual (changing) lives in the context of (changing) social structures*” (Jamieson, 2002a: 11) and is therefore concerned with ‘structure and agency’ from a life course perspective.

In addition, it has to be remembered how factors such as class, ethnicity and gender ‘permeate’ the whole life (Blaikie, 1992: 4). In this context, Mair (2007) and Dressel *et al.* (1997) point out the relevance of the concept of ‘intersectionality’, which has also been discussed in the literature review, to the field of gerontology. Dressel *et al.* (1997:579) argue that recognising the dynamic interplay of race, class, gender and ageing, and related interlocking oppressions, can contribute to a better understanding of how “structural factors shape and determine the experience of aging and growing old”. Critical gerontology can be viewed as critical realism through an ageing lens (Estes, 2008).

Nevertheless, it has also been pointed out that there has been a transition from presenting older people as products of structural constraints (Townsend, 1981) and victims of social exclusion to a reconstruction of older people as “social agents, choosing new identities through consumption and lifestyles” (Jamieson, 2002a: 16). In order to do justice to the diversity of OSEs, these two very different concepts have both been taken into consideration for this study.

To sum up, the combination of theories summarised above was identified as providing a useful framework for the study of OSEs. They recognise the diversity of the group, take into consideration the dynamic relationship between the individual and structural influences, and take account of the age-dimension by including aspects of social gerontology.

Figure 5.2: Conceptual Framework



This conceptual framework, visualised in Figure 5.2, represents the different theoretical lenses through which to research OSEs from the most general level (outer layer) to the most specific (inner layer).

The implications of this choice of theoretical approaches for the research philosophy, the choice of research strategies and methods will be discussed in the subsequent sections.

5.2 Philosophical Assumptions

As has been illustrated in Figure 5.1, the choice of research methodology depends on the theoretical and philosophical assumptions on which research is based and has implications for its method(s) (Creswell, 2003; Saunders *et al.*, 2007). The research philosophy adopted for a project contains important assumptions about the researcher's view of the world. How these different elements are related will now be looked at in more detail.

5.2.1 Research Approach

Deductive theory represents the most common view of the nature of the relationship between theory and practice (research). In this approach, research is conducted based on what is known about the subject area and existing theory. A hypothesis (or hypotheses) is deduced from theory and must then be 'tested for empirical scrutiny' (Bryman and Bell, 2003).

Given the scarcity of dedicated research specifically on OSEs and the lack of related theory, this study will be largely exploratory and adopts an inductive approach in which theory is developed based on themes that emerge from the data. This means that the research findings will be used to develop hypotheses which can later be tested. According to Strauss and Corbin (1998), theory derived from data is more likely to capture 'reality' than theory based on experience or mere speculation. However, it is important to point out that research is seldom purely inductive, as the researcher does not enter the empirical field with an unprejudiced mind. Strauss and Corbin (1998: 136) explain this perspective as follows:

Although statements of relationship or hypotheses do evolve from data [...], whenever we conceptualize data or develop hypotheses, we are interpreting to some degree. To us, an interpretation is a form of deduction. We are deducing what is going on based on data but also based on our reading of that data along with our assumptions about the nature of life, the literature that we carry in our heads, and the discussions that we have with colleagues.

Given the current dearth of research specifically on OSEs, this study aims to obtain a general understanding of the environment in which OSEs are operating, including their motivations, activities and experience, using these insights to contribute to theory-building in SE.

5.2.2 The Research Paradigm Spectrum

The two main philosophical standpoints are ontology and epistemology. The majority of the research methods literature makes a clear division between quantitative and qualitative research strategy and, linked to this, between epistemology and ontology (Bryman and Bell, 2003).

Ontology is concerned with the nature of reality (Saunders *et al.* 2007) and, as summarised by Bryman and Bell (2003: 19), relates to the question of “whether social entities can and should be considered objective entities that have a reality external to social actors, or whether they can and should be considered social constructions built up from the perceptions and actions of social actors”. The three main ontological stances are ‘Subjectivism’, ‘Objectivism’ and ‘Pragmatism’.

Epistemology studies ‘the nature of knowledge’, as well as what can be considered as ‘acceptable knowledge’ in an area of study (Saunders *et al.*, 2007). The central subject of epistemology is the question of “whether the social world can and should be studied according to the same principles, procedures, and ethos as the natural sciences” (Bryman and Bell, 2003: 13). The three main epistemological positions are ‘Positivism’, ‘Realism’ and ‘Interpretivism’.

Positivism claims the applicability of the methods of the natural sciences to the study of the social world and is often associated with a deductive approach and quantitative research methods (Bryman and Bell, 2003; Robson, 2002). It was a highly influential intellectual trend from the mid-nineteenth century and, until recently, the ‘standard view of science’ (Robson, 2002). However, the positivist perspective has been identified as inappropriate for this project for several reasons. Firstly, studying people is generally very different from studying the physical objects of the natural sciences and therefore requires a research procedure that reflects this distinctiveness. As Robson (2002: 4) points out, “one of the challenges inherent in carrying out investigations in the ‘real world’ lies in seeking to say something sensible about a complex, relatively poorly controlled and generally ‘messy’ situation”. A positivist approach would therefore struggle to “capture the real meaning of social behavior” (Robson, 2002: 23) and, as has been discussed in the context of theories on ‘embeddedness’ and ‘structure and

agency', to grasp the complexity of the issues surrounding older social entrepreneurs. Furthermore, some feminists argue that positivist knowledge is 'essentially male knowledge' which is used 'to oppress women', and anti-racists similarly perceive 'scientific' knowledge as "white knowledge' which serves to oppress non-white people (Harvey and MacDonald, 1993: 8). The participants in this study were expected to be a highly diverse group in terms of gender and ethnicity and the way in which they presented their experiences was likely to be dependent on their individual perspectives. It was therefore essential to take into consideration the historical, social and cultural contexts in which they are situated (Creswell, 2003, Saunders *et al.*, 2007), and positivism would clearly have struggled to do this. Moreover, a positivist and largely quantitative approach would not have been appropriate due to the exploratory nature of this study.

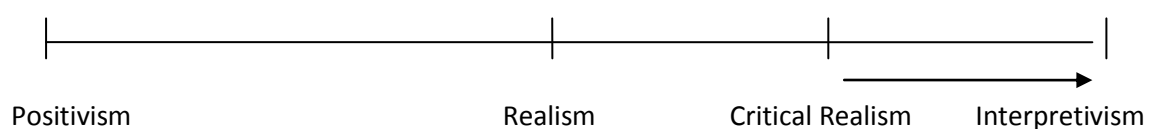
This critique of positivism also represents an interpretivist view. Interpretivism advocates the "necessity to understand differences between humans in their role as social actors" (Saunders *et al.*, 2007: 600). It has been influenced by different intellectual traditions, including the hermeneutic-phenomenological tradition (Bryman and Bell, 2003) which is of relevance to this study. Phenomenological ideas were initially applied in the work of Alfred Schütz (1899-1959). Phenomenology is an anti-positivist position that examines people's 'lived experiences' concerning a phenomenon (Creswell, 2003: 15) and attempts to see things from the participant's point of view (Bryman and Bell, 2003: 17). In this process, the researcher should 'bracket out' her or his personal experiences or preconceptions relating to her or his view of the world (Creswell, 2003; Bryman and Bell, 2003). Phenomenology is seen as a useful approach to "develop patterns and relationships of meaning" by "studying a small number of subjects through intensive and prolonged engagement" (Creswell, 2003: 15). Such an approach has been of relevance for this study, insofar as participants' individual experience is of importance for getting a deeper understanding of the issues facing the different groups of 50+ social entrepreneurs. However, although the importance of seeing the situation from their point of view is acknowledged, it is questionable to what extent it is possible for the researcher to exclude the influence of preconceptions of her or his grasp of the world. As has been argued in section 5.1.2 of this chapter, it is not possible to examine the experience of social entrepreneurs without taking into consideration the wider socio-economic and cultural context in which they are embedded. In the same way, it can be assumed that the results of the study (the way in which questions are understood, answered and interpreted) have been affected by the researcher's age, gender, cultural and socio-economic background.

Realism is an epistemological position which acknowledges that, in contrast to positivism, a reality exists independently of our thoughts or beliefs. Research is seen as referring to this reality rather than constructing it (Robson, 2002). In a spectrum of epistemological positions, realism would be located in the middle between positivism and interpretivism. Critical realism is a version of realism, located between realism and interpretivism (see Figure 5.2). It is primarily associated with the work of Roy Bhaskar (1989) and implies the view that “we will only be able to understand what is going on in the social world if we understand the social structures that have given rise to the phenomena that we are trying to understand” (Saunders *et al.*, 2007: 105).

Critical realism has already been discussed in some depth in relation to theories on ‘structure and agency’ in Chapter 2 of this thesis. In contrast to positivism, critical realism suggests that the structures identified may not be amenable to the senses (Bryman and Bell, 2003) and that, therefore, “what we see is only part of the bigger picture” (Saunders *et al.*, 2007: 105). It is critical of society in that it aims “to identify structures in order to change them, so that inequalities and injustices may be counteracted” (Bryman and Bell, 2003: 568). This emancipatory approach is relevant to the study of 50+ social entrepreneurs, given that older workers are marginalised and disadvantaged in society (Smeaton *et al.*, 2009) and also the general aim of SE to address the needs of disadvantaged groups.

In summary, critical realism and phenomenology, as a strand of interpretivism, were both identified as offering frameworks of particular value to this project. It was therefore decided to adopt an approach which combined selected beliefs from both epistemologies. Figure 5.3 gives an overview of the three main epistemological theories. The arrow indicates where the chosen approach is located in the spectrum.

Figure .3: Spectrum of Epistemological Theories



Source: By author

This study has therefore been undertaken from a pragmatic point of view, as choosing between the two positions appeared to be somewhat unrealistic and unnecessary for this

particular project. As Bryman and Bell (2003: 19) point out, “particular epistemological principles and research practices do not necessarily go hand in hand in a neat unambiguous manner”. According to pragmatism, the research problem is central, allowing the use of different philosophical or methodological approaches for different research questions and leads to mixed-methods studies in which both quantitative and qualitative approaches are adopted (Robson, 2002, Tashakkori and Teddlie, 1998). In addition, the pragmatic approach incorporates the belief that “reality is multiple, complex, constructed and stratified”, and that theory is underdetermined by fact (i.e. that any data set can be explained by more than one theory) (Reichardt and Rallis, 1994: 85; quoted in Robson, 2002: 43).

5.3 Research Strategy

Both qualitative and quantitative methods have their advantages and limitations and are more or less suitable for research in a particular context. Bell (2006: 7) describes qualitative and quantitative methods as follows:

Quantitative researchers collect facts and study the relationship of one set of facts to another. They use techniques that are likely to produce quantified and, if possible, generalizable conclusions. Researchers adopting a qualitative perspective are more concerned to understand individuals’ perceptions of the world. They seek insights rather than statistical perceptions of the world.

The past four decades have been characterised by so-called ‘paradigm wars’ in the social and behavioural sciences regarding the superiority of the positivist/empiricist approach, linked to quantitative methods, and the interpretivist/phenomenological approach, linked to qualitative methods (Tashakkori and Teddlie, 1998). More recently, there has been an increasing interest in ‘breaking down the quantitative/qualitative divide’ and the question has been raised as to what extent the contrast is a ‘hard-and-fast one’ or whether research methods are “more free-floating than is sometimes supposed” (Bryman and Bell, 2003: 466). The idea of combining quantitative and qualitative methods in a single study was first presented by Campbell and Fiske in 1959, when they employed mixed methods in their psychological study and encouraged other researchers to use their ‘multitrait-multimethod matrix’. Researchers recognised the limitations of single method studies and “felt that biases inherent in any single method could neutralize or cancel the biases of other methods” (Creswell, 2003: 15). This led to the development of triangulation - the use of different data resources or methods in a single study to increase the confidence in findings (Bryman and Bell, 2003). From the original concept

of triangulation further arguments emerged in support of choosing mixed methods, such as “to expand an understanding from one method to another, to converge or confirm findings from different data sources” (Creswell, 2003: 210).

As mentioned above, until recently, the principles and practices associated with quantitative research have been regarded as incompatible with most feminist research on women, tending to be characterised as ‘hard’ and therefore inherently ‘masculine’ by many feminist theorists (Bryman and Bell, 2003: 308). However, more recently (since the early 1990s) several feminist researchers have “acknowledged a viable and acceptable role for quantitative research, particularly when it is employed in conjunction with qualitative research (Bryman and Bell, 2003). In Creswell’s (2003: 136) view, the use of theoretical perspectives as gendered, feminist, cultural/racial/ethnic and class perspectives are “one of the major decisions to be made in the selection of mixed methods strategies”. Furthermore, Mertens (2003: 16) points out that a mixed methods approach can serve the purpose “to change and advocate for marginalised groups, such as women, ethnic/racial minorities, members of gay and lesbian communities, people with disabilities, and those who are poor”. As has been pointed out in the context of intersectionality in section 5.1.3, taking these structural factors and their interplay into consideration has been important for this study, as they shape the experience of ageing and growing old.

Given the above, a mixed methods approach was identified as most appropriate for addressing the research problems identified for this study. Creswell (2003: 22) describes the advantages of a mixed methods design as follows:

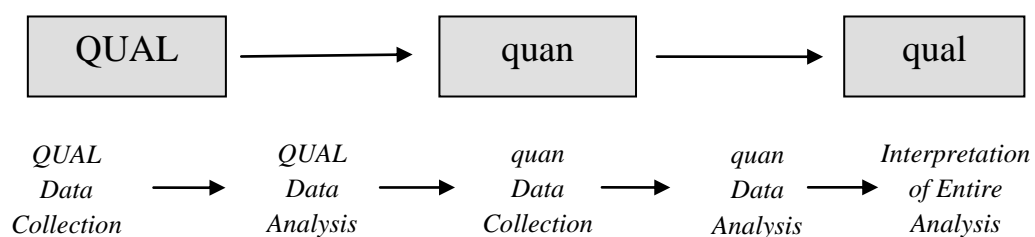
[It] is useful to capture the best of both quantitative and qualitative approaches. For example, a researcher may want to both generalize the findings to a population and develop a detailed view of the meaning of a phenomenon or concept for individuals. In this research, the inquirer first explores generally to learn about what variables to study and then studies those variables with a large sample of individuals.

Another reason for selecting a mixed methods approach is that the research problem incorporates the need to both explore and explain (Creswell, 2003). It has already been pointed out that this study is largely exploratory, as little previous research has been conducted on OSEs. However, the audiences to whom the findings will be reported will also have to be taken into consideration. The groups which are expected to be most interested in research in this field are academics, policy makers and the people it is about – 50+ social entrepreneurs. Policy makers and support organisations will want to ensure that any existing and new initiatives to support practitioners, which may be developed on the basis of the

findings, meet the specific needs of as many individuals as possible. As Hakim (2006) points out, qualitative research can be harder to 'sell'. Supporters of quantitative research often stress the limited generalisability of findings in qualitative research. Even if great care is taken in selecting the sample, they criticise the results for low representativeness, due to the usually small number of respondents. Therefore, a mixed methods design has been used to increase the validity and generalisability of the findings (Tashakkori and Teddlie, 1998). Furthermore, whereas all designs have, more or less, implicit theories, Creswell (2003) emphasises that a mixed method approach allows for a larger theoretical perspective to guide the entire design, as is the case for this study (see section 5.1 on conceptual framework).

In this project, the two methods were used sequentially and the study was structured in three phases. It began with qualitative, open-ended interviews to collect detailed views from the participants. This information was used to form categories or themes, which served to develop broader patterns, and theories (Creswell, 2003). The second, quantitative, phase of the study, included the analyses of UnLtd's database and annual survey of so-called Award Winners (individuals or groups that have been provided with practical and financial support by the organisation), which assisted the interpretation of the qualitative findings and allowed results from phase one to be generalised to a larger population of OSEs. The quantitative phase was followed by a second qualitative phase, which was mainly used to aid the interpretation in the final analysis and, hence, conducted concurrent to it. These interviews provided the opportunity to follow up the first round of interviews and to further explore important issues which were still unresolved at that stage, or which had only emerged in the quantitative phase. This process can be visualised as in Figure 5.4.

Figure .4: Sequential Exploratory Design



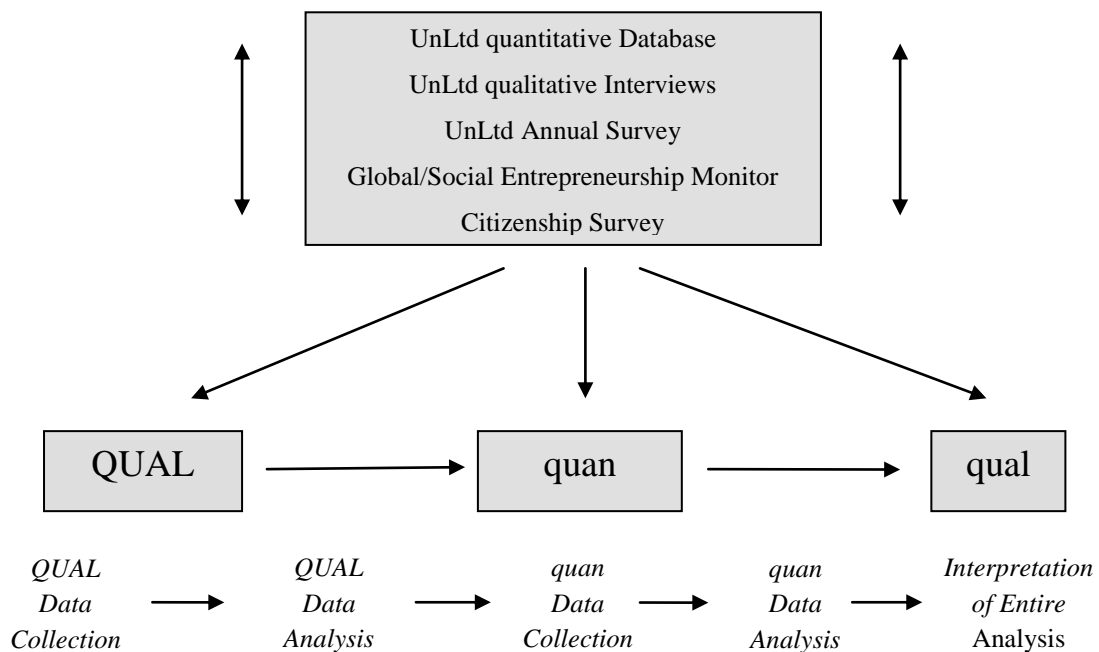
Source: By author, adapted from Creswell (2003: 213)

The qualitative element of the study has been dominant. This priority of the first phase of qualitative data collection and analysis is indicated through notation adapted from Morse (1991) and Tashakkori and Teddlie (1998). The arrows indicate a sequential form of data

collection and capitalisation indicates the first qualitative data collection and analysis phase in the study as the most intensive. However, the abbreviations ‘Quan’ and ‘Qual’ use the same number of letters to indicate equality between the forms of data.

Furthermore, the validity of the study has been increased through triangulation within and between methods and secondary data sources (Creswell, 2003; Tashakkori and Teddlie, 1998; Bryman and Bell, 2003). Triangulation has been used not only to gain understanding of OSEs by using mixed methods, but also to compare findings between existing qualitative and quantitative data, as well as that collected as part of this project, as shown in Figure 5.5.

Figure .5: Triangulation Strategy in the Study



Source: By author, adapted from Creswell (2003: 213)

The challenges this form of research poses for the inquirer have been noted. These include the need for extensive data collection, the time-intensive nature of analysing both text and numeric data, and the requirement for the researcher to be familiar with both quantitative and qualitative forms of research (Creswell, 2003).

5.4 The Life History Approach

As Jamieson (2002b: 21) points out, although the practical issues of research in social gerontology are, generally, little different from those in other areas of social research, “there are some research issues which are specific to the study of ageing, and there are strategies and methodologies which are particularly suited to social gerontology inquiry”. One of these strategies, which has already been identified as useful for this study in section 5.1.3, is the life course perspective.

In the life history approach, which is one element of the life course perspective, individuals are asked to recall, retrospectively, information on their experiences at different points of their lives. According to Giele and Elder (1998: 12), it documents the role of the third life course principle of ‘human agency’ (see Section 4.2.1) “in the face of social constraints and opportunity”. As they explain further, it is used as a method for “capturing the subjective meaning of experience that cannot be wholly represented by quantitative survey methods” (Giele and Elder, 1998: 19). Although studies applying this approach tend to be of a qualitative nature, rather small-scale and use in-depth interviews (Bornat, 2002; Bryman and Bell, 2003), according to Dex (1991), they could also be both quantitative and qualitative. Bornat (2002: 117) describes the rewards of the approach as follows:

The story on an individual life told in the first person yields information about a generation and a cohort as well as accounts which are gendered, cultural and historical. It may throw light on forgotten or hidden aspects of past experience, bringing to the foreground lives which have been marginalized, disregarded and downgraded. It may challenge existing assumptions and dominant narratives with subversive evidence. Perhaps most rewarding for the gerontologist, as a process it has the capacity [...] to make links between past lives and present experience as well as hopes for the future.

The life history perspective is therefore suitable for the study of OSEs in several respects. It takes into account the diversity of the group and, related to this, the aspect of intersectionality. Furthermore, given the exploratory nature of this study and the fact that little is known about OSEs and key aspects of their experience and behaviour, there is a danger that the researcher omits questioning around some key issues. By having been given the opportunity to tell their story and to raise points that are important to them, participants are able to provide a more complete picture of the issues they face and, consequently, to improving the quality of the findings (Bornat, 2002; Jamieson, 2002b; Miller, 2000).

It is recognised that this approach presents a methodological issue which is frequently referred to as the 'age/period/cohort (APC) problem' and summarised by Jamieson (2002b: 21-2) as follows:

The issue is one of distinguishing between changes which are due to the impact of social factors (period and cohort effects). Thus, differences found through cross-sectional comparisons of characteristics of different age groups (cohorts) could be due to the different social contexts in which they have been developing rather than their chronological age and are described as cohort effects. These differences would manifest themselves in future social change, as the younger generations grow older and replace the current older generations. Social influences that affect all cohorts or generations at a given time are referred to as 'period effects'. They represent general social change and will of course also influence the changes observed in individuals as they go through the life course.

Hence, these issues of period and cohort effects, which were also briefly discussed in relation to the role of the socio-historic context of the five life course principles as well as individuals' values and self-identity in Chapter 4, had to be taken into consideration in the analysis of the qualitative data.

In theoretical terms, the life history approach is closely linked to the question of the extent to which and in what ways continuity theory is relevant in explaining people's lives (Jamieson, 2002a). Continuity theory has already briefly been discussed in the context of ageing and identity in Chapter 4. Based on the work of Atchley (1989; 1999), it argues that "although people seek change they also seek a certain amount of continuity, both psychologically and socially" (Jamieson, 2002a: 13). Furthermore, it "presumes that most people learn continuously from their life experiences and continue to grow and evolve in directions of their own choosing" (Atchley, 1999: vii; quoted in Estes *et al.*, 2003: 31). In the context of OSEs, this study has been concerned to examine how and why participants chose to become involved in SE activity and how aspects in their past had influenced this decision.

5.5 Reflection and Role of the Researcher

There has been a development towards greater awareness of the need for the researcher to acknowledge her or his role in the research process as an important influence on the construction of knowledge. It is argued that the use of reflexivity helps to identify areas of potential researcher bias (Robson, 2002; Bryman and Bell, 2003: 529).

Business researchers should be reflective about the implications of their methods, values, biases, and decisions for the knowledge of the social world they generate. It assumes that all researchers enter the field carrying cultural 'baggage', personal idiosyncracies and implicit assumptions about the nature of reality. [...] The researcher is viewed as implicated in the construction of knowledge through the stance that he or she assumes in relation to the observed and through the ways in which an account is transmitted in the form of a text.

Therefore, the researcher's values are reflected in all stages of the research process. Based on their value orientations, they make judgements and decisions on what to research, the choice of philosophical approach and methods, data collection techniques, as well as analysis, interpretation and presentation of findings (Saunders, 2007). For instance, a study which focuses on data collected through face-to face interviews suggests that the researcher values personal interaction with the participants more highly than their anonymous views expressed through a postal questionnaire (Saunders, 2007).

In this section, I will therefore present my thoughts on how my personal background has shaped the research experience. As has been argued in Section 5.1.2, it is not possible to examine the experience of social entrepreneurs without taking into account the wider socio-economic and cultural background in which they are embedded. In the same way, it can be assumed that the results of this study have been affected by my age, gender, cultural and socio-economic background.

In my view, the influence of my demographic characteristics was particularly apparent during the face-to-face interviews, and I could observe the different ways in which the fact that I was female, non-British and, most importantly, younger than the participants shaped the interview experience. Given that I myself was not aged over 50 meant that I was not 'one of them', and this had different implications for the account that interviewees provided, which were also reflected in their use of language. For example, participants often used expressions such as "people your age", "when I was your age", "this was probably before you were even born".

While the oldest interviewees in the sample in particular tended to treat me as a child or even grandchild, keen to share their knowledge and tell me about their life experience and 'how things used to be', a couple of cases appeared to view me as the young competitor who lacked the necessary experience and knowledge to fully understand the 'real' dynamics of SE. Consequently, my characteristics and values in combination with those of the participants shaped the course of the interview, its atmosphere as well as the nature of the information provided by the interviewees. At the same time, it was necessary to adapt my interview

techniques to suit the interview situation and to find the right balance between following my interview schedule and being alert for new unforeseen themes.

Another challenge was provided by the adoption of the life course approach, which required that I ask interviewees to share very personal and emotionally laden information with me, which they were more or less willing to do. However, the majority of participants became more comfortable and open over the duration of the interview. One participant even offered to show me her family picture albums. Others appeared astonished by the nature of questions asked and, with hindsight, also by how much they had revealed about themselves. When asked at the end whether they wanted to add anything that I had not asked them about, one participant said with a smile: “There is nothing to add – you have my life...”.

To sum up, I acknowledge the influence that my personal background has had on the entire research process, and how the personal interaction between myself and the interview participants has shaped the content of the qualitative data. However, wherever possible, I have made an attempt to take these factors into account in the analysis, interpretation and presentation of the data (Creswell, 2003).

5.6 Data Collection

The following sections will present the practical implementation of the project and illustrate how the adopted philosophical assumptions and the chosen research strategy were translated into a three-phase sequential mixed-methods study, conducted over a period of two and a half years (2010-2012).

5.6.1 Qualitative Phase I

Selection of the Sample

The problematic issues with respect to the term ‘social entrepreneur’ were pointed out in Chapters 1 and 3. Although the appropriateness of SE terminology for capturing the nature of the phenomenon is contested, the existence of a vast literature on the subject and ongoing debates amongst researchers, policy makers and practitioners indicates that it is a legitimate object of study. However, it demonstrates the challenges associated with the selection of a

sample of 'social entrepreneurs' are demonstrated by the existence of a considerable variety of overlapping and sometimes conflicting definitions, as well as previous research which suggests that social entrepreneurs often do not identify with this label.

A broad definition of social entrepreneurs has been adopted for the purposes of this study, including individuals or teams of people who were running projects with social/environmental aims, irrespective of whether they were operating under a recognised social enterprise legal form. The participants included those involved in social entrepreneurial activity within or outside social ventures, and also some board members. This inclusive approach was also chosen in order to reach people who might not necessarily see themselves as social entrepreneurs, and to gain a more comprehensive understanding of OSEs by exploring the language they used to describe their work, their motivations, their areas of activity, challenges/barriers experienced and support needs.

The sampling frame for the qualitative phase was compiled from the database of 5,426 social entrepreneurs held by the partner organisation UnLtd, as well as from the network of social entrepreneurs and related support organisations which the researcher developed as part of the project.

The UnLtd database was used to establish initial contacts with 50+ social entrepreneurs. The database contained information on the UnLtd Award Winners, social entrepreneurs that had been provided with practical and financial support by the charity. As UnLtd point out, it is people who are important to them; hence, they only offer support to individuals or teams and do not support organisations. At the time the research was conducted there were two main levels of award: Level 1 Awards (£500 to £5,000) were "designed to help make new ideas become real projects", and Level 2 Awards (up to £15,000) aimed to "support people whose ideas are already developed or pay for the living expenses of Award Winners to help them devote more time to their projects"³⁶.

The aim of this project has been to study 'older' social entrepreneurs. Although there is no universally accepted definition in the UK, the age of 50 is frequently used as a cut off point for the beginning of 'older' age (Kautonen, 2008). In order to allow for comparisons with other work on the older population, this project also focused on social entrepreneurs aged over 50. The first qualitative phase concentrated on individuals who were based in the London area, in order to allow face-to-face interviews wherever possible. Participant bias or error was

³⁶ See <http://www.unltd.org.uk>.

minimised by only including completed projects, i.e. social entrepreneurs who were no longer financially or otherwise dependent on UnLtd. At the time, the database contained 95 cases (58 female; 37 male) of social entrepreneurs aged between 50 and 80 who operate in and around London, and who had received support from UnLtd in the past. The social entrepreneurs in the sample were involved in a wide range of activities, with education (19), environment (11), health (8) and arts (8) being most popular. Furthermore, in 54 cases the projects were focused on addressing social needs within specific communities of interest (e.g. cultural) and of place (e.g. local), and deprived communities.

Given the dearth of research on OSEs and the exploratory nature of this study, in-depth interviews were identified as the most appropriate data collection tool to allow exploration of the experiences of the participants and provide in-depth understanding of the particular needs of this group.

The interview candidates were selected to represent the population of UnLtd Award Winners over 50. The participants were between 51 and 71 years old, and of different gender (11 women, 10 men) and ethnic background. As will be discussed in Chapter 6, they were operating in a wide range of different areas and addressed a large variety of social needs. Some of the study participants were operating at national or international level but, like younger award winners, most were locally focused. An overview of participants is presented in Section 6.2.2, and case summaries are provided in Appendix D.

A purposive sampling approach was used (with an emphasis on selecting individuals that appeared to be 'rich' in data (Shaw and Carter, 2007). The sample was also stratified by gender. After 21 interviews, the first phase was seen to be completed, since no new categories emerged and, thus, saturation had been achieved (Robson, 2002).

The In-depth Interviews

The interview schedule was developed based on the themes and gaps identified in the literature review and the research questions. A number of questions in the interview schedule were specifically tailored to examine the age-dimension of SE activity. Open-ended questions were used to allow the participants to express their views in the form of life stories. Biographical accounts focused on the individuals' experience and their social and cultural context (Bryman and Bell, 2003; Creswell, 2003). This approach yielded rich insights regarding pathways into SE while also revealing expectations, challenges and aspirations. It has been the

aim of the researcher to make sense of (or interpret) and understand the multiple meanings of participants' motives, actions and intentions in a way that appeared meaningful (Saunders, 2007) and to probe for the "complexity of views rather than narrowing meanings into a few categories or ideas" (Creswell, 2003). An attempt was also made to interpret the participants' experience from their own point of view. However, it also needs to be recognised that the researcher's view, in the same way, could not be fully detached from her own personal values (Creswell, 2003).

The suitability of the interview schedule was tested in a pilot study of five in-depth interviews. The experience of these first interviews facilitated additional depth in the main study in those areas which had emerged as particularly important, with new questions included on topics which had not previously been identified as significant. Furthermore, given its exploratory nature, this qualitative phase of the study was treated as an iterative process, allowing for questions to be amended on an ongoing basis and to be tailored to the individual participants and their circumstances. The interviews were conducted between March 2010 and August 2011.

Interviews were administered face-to-face where possible and via telephone in four cases. In the majority of cases, the research took place at the project venue (which was sometimes in the participant's private home), but in a few cases the interviews were conducted in public places such as cafés or restaurants. These 'natural settings' allowed the development of a high level of detail about the social entrepreneur and the activity, and enabled the researcher to gain a strong impression of the actual experiences of the participants (Creswell, 2003). Where a project was led by a team, the team-leadership experience was taken into consideration throughout the interview. In two cases, interviews were conducted with two members of the same team, allowing a deeper understanding of the nature of such teamwork. All interviews were recorded and fully transcribed, and all of the participants agreed to a follow-up interview (see section 5.5.3 on Qualitative Phase II).

Qualitative Data Analysis

The qualitative data was inductively analysed through constant comparative analysis and supported by the use of NVivo software. Nodes³⁷ were developed, informed by data and

³⁷ In NVivo coding is defined as the process of marking passages of text in a project's document with 'nodes'. Nodes are items created by the researcher to represent and organise a certain idea or theme about the project (Bryman and Bell 2003: 450).

reflection on theory, to identify key ideas and categories (Bazeley, 2007; Bryman & Bell, 2003; Richards, 2009; Tashakkori & Teddlie, 1998). The interview transcripts were searched for themes and patterns (identified through key words which could be combined in clusters), such as pathways into entrepreneurship, motivations of the participants, challenges/barriers faced and attitudes towards risk. Key words and subsequently emerging themes were organised in tree nodes in NVivo to create structure and support analysis (Bazeley, 2007). It has to be recognised that the analysis and conceptualisation cannot be viewed as purely inductive (Strauss and Corbin, 1998), as it will have been influenced by the researcher's knowledge of theory in the fields of entrepreneurship, SE and social gerontology. The information gathered in this phase was considered for the development of the second (quantitative) phase which was used to support the findings from the qualitative data and to generalise the interview results to a larger population.

5.6.2 Quantitative Phase

Selection of the Sample

The quantitative phase drew upon two main elements: 1) the UnLtd database of award winners, consisting of 5,426 cases, including 982 social entrepreneurs aged 50+, and 2) UnLtd's Annual Award Winner Survey 2012 which drew on a sample derived from the UnLtd database and had 1,014 responses. Whereas the qualitative phase focused on the London area, the quantitative elements included social entrepreneurs from across the UK, in order to obtain quantifiable evidence and, hence, more generalisable results. In addition, whereas the qualitative phase was focused on social entrepreneurs over 50, the quantitative phase included award winners of all ages, allowing for comparisons between the different age groups.

The Survey

Although the analysis of the quantitative database allowed testing of the generalisability of the qualitative findings in terms of demographics and areas of activity, the database did not hold information on how social entrepreneurs were operating, i.e. how they funded their social ventures, whether they were drawing a personal income from their SE activity, or whether they used staff and volunteers.

Consequently, the quantitative survey was designed by UnLtd on the basis of two influences: 1) outcomes of the first qualitative phase of this study, as well as other qualitative research undertaken by the organisation, and 2) existing surveys which included information on social entrepreneurs (e.g. Global Entrepreneurship Monitor). As in the case of the qualitative element, the use of existing survey data allowed comparisons between the older age groups and social entrepreneurs generally through triangulation.

Quantitative Data Analysis

SPSS was used to analyse the quantitative data, including significance testing of the differences between the observed frequencies (through chi-square tests) in relation to key variables and categories which had emerged from the qualitative phase (Saunders *et al.*, 2007).

The findings of the first two phases were then integrated during the interpretation phase which was used to identify and understand how OSEs can be reached and how their diverse needs can be better addressed, including suggestions for the development of appropriate support mechanisms.

5.6.3 Qualitative Phase II

As has been pointed out in section 5.3, the main objective of the second qualitative phase was to gather further data to support the 'interpretation of the entire analysis' in the final phase at the end of the study (see Figure 5.2). These interviews, conducted in autumn 2012, provided the opportunity to follow up the first round of interviews and to further explore important but unresolved issues, or new issues which had emerged in the quantitative phase. In a few cases, interviewees had stayed in touch with the researcher and provided regular updates. Follow up interviews with eight participants allowed a check on how they had been getting on since the last interview and the collection of additional information on, for example, the sustainability of the project.

5.7 Validity and Generalisability

Validity and generalisability are central concepts for ensuring that the audiences of the research accept the findings as believable and trustworthy. Validity refers to the question as to

whether the findings are ‘really’ what they claimed to be and generalisability relates to the extent to which the findings can be applied to other situations and populations. Furthermore, the reliability of a study is concerned with the question whether the results would be the same if the study was repeated. Limited generalisability is seen as a principle weakness of qualitative research.

However, the applicability of these concepts for qualitative research is a matter of considerable debate (Bryman and Bell, 2003; Robson, 2002). As mentioned above, a mixed methods design and the use of triangulation helped to increase the validity and generalisability of the project (Tashakkori and Teddlie, 1998).

At the same time, the study does not make a strong claim to generalisability, as the main intent has been to gain an understanding of the complex and multi-faceted reality and experience of OSEs. It is focused on achieving ‘depth’ rather than ‘breadth’ (Baxter *et al.*, 2001).

Another aspect which had to be taken into account was the question to what extent the results were biased due to the values, or special characteristics and expectations, of the researcher. Similarly, the fact that the researcher was of a particular age, gender and ethnic background will also have had an influence on the accounts given by the qualitative interview participants. This bias was reduced by providing information on the background and the motivations of the researcher with the results of the study (Bryman & Bell, 2003) (see Section 5.5).

5.8 Ethical Considerations

All reasonable precautions were taken to ensure that the participants were in no way harmed; for example, regarding their professional and personal reputation, by invasion of privacy or deception. In part, this was ensured by following Middlesex University’s regulations and guidelines for conducting ethical research and by obtaining approval from the Business School’s Ethics Committee.

It is also relevant to note that, according to Butler (1990: 162), to suggest that older people require special ethical consideration as research subjects “is to fall the trap of ageism and adopt a paternalistic attitude”. Gilhooly (2002: 211) agrees and argues as follows:

Most older people live independent lives, are self-determining, and are competent to decide whether or not to take part in research. Thus, they should be treated in the same way that one would treat any other adult asked to take part in research with older people than they are when conducting research with younger adults.

In this study, the term 'older people' relates to anybody over 50 years of age and, hence to an extremely heterogeneous group of citizens. Nevertheless, it is recognised that there are some areas where older people may be more vulnerable to abuse, due to their personal circumstances. These may be related to other basic characteristics such as gender, socio-economic or cultural background and health (Butler, 1990).

However, given the nature of the research and the small sample size of the qualitative phase, the issues of confidentiality and anonymity posed a particular challenge and care has been taken regarding the possible identification of persons, organisations and places. Hence, informed consent was obtained from the participants. The principle of consent means that the nature and the purposes of the research is explained to the potential interviewees, so that they can make the choice whether or not to participate in the study. It has to be emphasised that it is extremely difficult to provide prospective interviewees with all the information that might be required for the decision about their involvement, and it is not always feasible to anticipate all of the possible consequences for the respondents. However, participants were given as much information as possible, including the motivation for the study (and who was sponsoring it), the nature of their involvement in the research, how long their participation was going to take, that the participation was voluntary, that they could withdraw from participation at any time, that recording equipment would be used, that a request of confidentiality and anonymity would be adhered to, and how the data would be used.

5.9 Summary

This chapter has set out the methodology for this study, which has been identified as providing the most suitable approach for studying OSEs. The research questions necessitated an emphasis on a qualitative approach using exploratory interviews which produced particularly rich data and served to gain in-depth insight into the experiences of OSEs.

Overall, the data collection and analysis process was set out as three-phase, sequential mixed methods study. The first phase consisted of a qualitative examination of OSEs and involved collecting data through face-to-face in-depth interviews. Biographical accounts and life stories

yielded rich insights into pathways into SE while also revealing expectations, challenges and aspirations. Such themes from this qualitative data assisted in developing a series of profiles and pathways for OSEs which could then be tested against a broader sample in a second, quantitative phase. The third phase of qualitative interviews served as an opportunity for the researcher to clarify important aspects for the final interpretation of the entire analysis.

Limitations of the study relate to the limited validity and generalisability of the findings. However, it has been pointed out that the main aim of the project is to gain an understanding of the complexity of the research problem. Furthermore, the possibility of bias has been drawn attention to in the context of the role of the researcher.

The following empirical chapter will examine the role of older people in SE activity in the UK. Drawing on both the qualitative and quantitative data sources, it will present the findings on who they are, what they do and how they operate.

6. Social Entrepreneurship in Later Life

6.1 Introduction

In order to develop the understanding of OSEs, this chapter empirically explores the scope of older people's involvement in SE activity in the UK. Building on the relevant factors and gaps in knowledge identified in the literature review, the following research questions are addressed in this chapter:

Who are 50+ Social Entrepreneurs?

What are the main demographic characteristics of older social entrepreneurs (gender, race/ethnicity, social/educational background)?

What is the role of people over 50 in SE and what is the nature of their social entrepreneurial activity?

What do they do?

What are their areas of activity and levels of involvement? What is the scope, scale and impact of their activities?

How do they operate?

What legal forms do they utilise? How do they fund their social entrepreneurial activities and themselves? What is the role of staff and volunteers? What is the role of teams and networks?

Self Identity as OSEs

How do they view their age and life stage in the context of their social entrepreneurial activity? How do they define the nature of their activity (e.g. voluntary activity, community activism, or as a business with social aims)?

A typology of OSEs is subsequently developed from the analysis in order to capture the spectrum of approaches entailed and their rationales for being involved in SE. Three types will be identified, namely the 'Volunteer Activist', the 'Rationalising Professional' and the 'High

Aspirer', who differ in terms of key demographic characteristics, and their contribution to and expectation of SE.

Exploring these questions will also help to shed some light on the apparent under-representation of older people in SE, as well as questions around the presentation of social entrepreneurs as 'heroic' individuals, which were discussed in Chapters 2 and 3.

An approach has been selected, which takes into consideration the diversity of OSEs and the different ways in which their individual experiences are shaped by their social, cultural and educational/professional backgrounds. In order to account for the age-dimension, theories in social gerontology, addressing aspects such as age as a social construct, quality of life and age identity in later life, will provide a lens to focus the discussion.

The first section of the chapter will introduce the reader to the data sets used, as well as the typology, and thereby provide the necessary background information for this and the following empirical chapter. The subsequent sections will be structured around the key themes identified as important for tackling the research questions (see above).

6.2 Who are 50+ Social Entrepreneurs

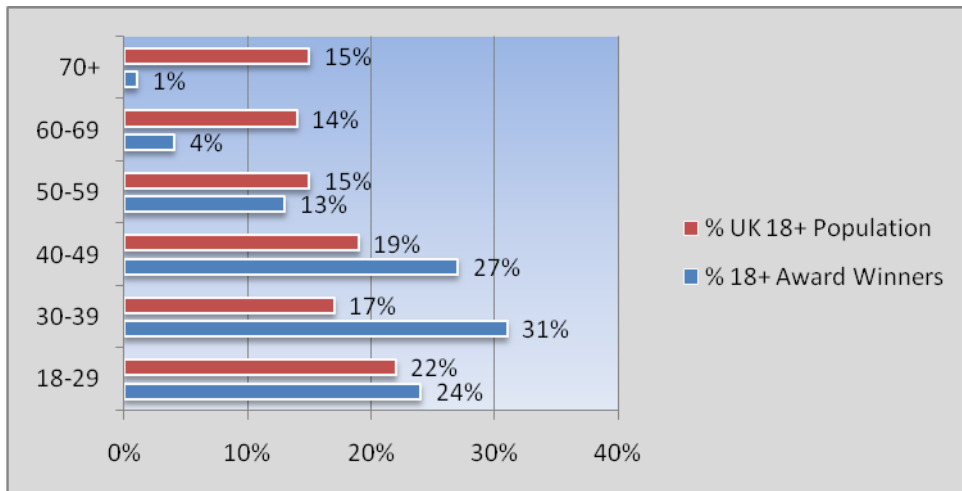
This study draws on two main sources of data. The quantitative data was derived from the UnLtd data base which held 5,426 cases of UnLtd award winners (AWs) across all ages, including 982 social entrepreneurs aged 50+. This was used to identify important patterns which could then be explored in greater depth in the analysis of the qualitative data, which consisted of 21 in-depth interviews.

6.2.1 Participation in Social Entrepreneurship

Analysis of the quantitative database revealed that people aged 50 and over are clearly under-represented amongst UnLtd's social entrepreneurs. While making up 44% of the population aged 18+ (ONS, 2009a), people over 50 only constitute 18% of UnLtd AWs, and are less likely to be involved in SE activity than all other age groups over 18 (see Figure 1). This is similar to Levie and Hart's (2011) findings on 55+ SE in the UK. They found that those aged 25-34 (11.7%) were least likely to be SE active, followed by those aged 55-64 (13.2%). However, their results

also revealed that the 55-64 age group was more likely to get involved in social (13.2%) than in 'mainstream' (11.6%) entrepreneurial activity.³⁸

Figure 6.: Comparison of 18+ UnLtd AWs and UK Population by Age Group³⁹



Source: data base of UnLtd AWs

However, as Figure 6.1 illustrates, in the under 50 age groups, AWs are over-represented in relation to the UK population in the same age group. This relationship is reversed in the over 50 age groups, where they are under-represented in relation to the UK population. Figure 6.1 also shows that, amongst UnLtd's social entrepreneurs, the decline in participation is becoming even more profound for those aged 60+. Only 18% of AWs are over 50, 13% are in their 50s, leaving only 5% aged 60 and over⁴⁰. The difference in proportion between these two age groups is highly statistically significant (paired-sample t-test, $p < 0.001$; see Appendix E for a summary of statistical test results).

Levie and Hart's (2011) finding that the 55+ age group is more likely to opt for SE than 'mainstream' entrepreneurship suggests that SE is a more common form of transition to retirement than self-employment. Given that every fourth person aged between 50 and 74 volunteers (ONS, 2010b), it may also indicate that people turn towards more socially oriented activities when they get older. Nevertheless, at the same time, there is a strong decline in SE

³⁸ It has to be noted at this point that the use of different age group categorisations in the two studies makes comparisons of findings difficult and confusing.

³⁹ Referring to UK population and UnLtd AWs over 18.

⁴⁰ In order to explore the particularly strong decline in participation among the over 60s in more depth, almost half of the interviewees were selected from this age group.

participation amongst UnLtd AWs at an age (60+) that suggests potential for increasing involvement as a bridge or alternative to retirement. These patterns will be examined in detail in the context of the role of SE in participants' retirement decisions in Chapter 7.

The following sections will draw on qualitative in-depth data in addition to the quantitative data, in order to explore the nature of and possible reasons for this apparent under-representation, as well as tackling the research questions set out at the beginning of this chapter. Furthermore, analysis of the qualitative data is used to examine the wider personal and societal contexts in which the participants were embedded and operating. First, however, the next section will explain how the analysis of this data prompted the development of a typology of OSEs.

6.2.2 A Typology of Social Entrepreneurs

As the analysis of the qualitative interview data revealed, the participants were not only a diverse group in terms of their demographic characteristics, but also with regard to the type of SE activity they were involved in, their motivations and how they operated. These differences turned out to have a considerable impact on their contributions to SE, their expectations of the activity, and also their support needs. Drawing on the themes that emerged from the data, a typology has been developed which reflects this diversity. It is the aim of this section to explain how the types evolved, before discussing each of the typology's elements in detail in this and the following chapter.

The three-way analysis presented mainly draws on the qualitative data, but is supported by relevant quantitative data. The qualitative data is provided by 21 in-depth interviews undertaken with OSEs, and the quantitative data is drawn from UnLtd's database of AWs and their Annual Survey 2012 (see Chapter 5 for more details on data sources). It should be noted that, although the typology draws on data on social entrepreneurs in later life, it is not age specific and, therefore, can be seen to apply to social entrepreneurs of all ages.

Social Value Creation

A key characteristic which all interview participants had in common was the strong motivation to address social objectives, as also identified in the SE literature (e.g. Dacin *et al.*, 2010; Shaw and Carter, 2007), which is directly linked to the main focus on creating 'social value' (Dees *et al.* 2001; Seelos and Mair, 2005; Volkmann *et al.*, 2012). More specifically, motivations were often highly personal in nature, as reflected in the variety of the activities entailed, and influenced by participants' life courses. The interviews revealed how different personal and professional backgrounds influenced the ways in which participants had sought to create social value, their conceptions of SE, as well as the ways in which they operated. Most notably, differences in motivations resulted in variations in the extent to which social objectives were accompanied by the aim to generate income through trading, whether a personal income was drawn from the SE activity, and, relatedly, the degree of formalisation involved, and the organisational form and structure adopted. This spectrum of expectations and contributions provided the foundation upon which the typology was developed.

Building on this spectrum, further patterns emerged from the data in relation to the issues discussed in the context of the schools of thought on (social) entrepreneurship presented in Chapters 2 and 3, as well as ageing theories discussed in Chapter 4. These related to participants' levels of involvement, scope and scale of their SE activity, their attitudes towards risk and the role of SE in their lives, and how these factors were affected by life course stages.

Based on these patterns emerging around the multiple criteria derived from the data, three types were identified, as shown in Table 6.1 which summarises the key characteristics of the three types by theme. Table 6.2 presents a paradigmatic case for each type, and Table 6.3 provides a summary of participants by type. In addition, a comprehensive overview of types is provided in Appendix C.

Almost half (10/21) of the participants were running small scale social ventures that were very localised in scope, mostly in the form of unincorporated initiatives and without trading income, and often as form of self-help to address social problems they were affected by themselves. These were labelled 'Volunteer Activists'. One third of the qualitative sample consisted mainly of professionals who had adopted a more strategic approach to SE, with the majority operating under a legal form and drawing an income from trading. This group were categorised as 'Rationalising Professionals'. Four cases were characterised by running social

ventures at a larger scale, two of which were international in scope. This group are denoted as 'High Aspirers', reflecting their aim to achieve the largest possible impact for the social need that they were addressing.

Table 6.1: A Typology of Social Entrepreneurs

	'Volunteer Activist'	'Rationalising Professional'	'High Aspirer'
Balance of social and entrepreneurial objectives	Social objectives with entrepreneurship Social Entrepreneurship		Entrepreneurship with social objectives Social Entrepreneurship
Who are they?	'Extraordinarily ordinary' ⁴¹ social entrepreneurs – least likely to draw a personal salary from activity	Professionals who use SE <i>more</i> strategically than 'Volunteer Activists' – most likely to generate personal income	Professionals with a <i>highly strategic</i> approach to SE, mostly with previous experience of self-employment or employment in larger organisations
What do they do?	Address problems specific to the local or cultural community that are often neglected by the public sector and the third sector	Strategically use their professional experience and transferable skills to benefit others	Address social issues at a larger scale, aiming to achieve considerable structural changes
Scope and Scale	Local/niche – Responding to needs of local community; small scale either by choice or due to constraints	Mostly local in scope; small by choice or with aspirations to grow	Local to international in scope; medium to larger scale and growth oriented
Legal Form	Mostly unincorporated	Formal or in process of formalisation	Formal
Role of SE activity in their lives	Very varied, but often form of self-help to address social problems they are affected by themselves	Either a full-time 'job' or downshifting/lifestyle change	'All consumed' by their activity but enjoying the challenge
Attitude towards Risk	Equally divided into moderate and strong risk takers	Moderate, very calculated risk takers	Strong risk takers

Source: qualitative data

⁴¹ This term is based on Amin (2009): 'Extraordinarily Ordinary: Working in the Social Economy'.

Table 6.2: A Typology of Social Entrepreneurs – Paradigmatic Cases of OSEs

	‘Volunteer Activist’	‘Rationalising Professional’	‘High Aspirer’
Who are they?	Audrey (57, Black-African) – Evicted from a country experiencing war and ongoing conflict over 20 years ago, she set up cultural activities for her ethnic community	Andrea (57, White-British) – Created social venture after deciding to leave her high profile job in the city of London	Bill (62, White-British) - Has been involved in the third sector for 40 years and created 9 organisations over his life
What do they do?	Runs a cultural community centre, allowing her people to practise cultural traditions and discuss their common issues	Uses her professional experience to run an organisation which helps a disadvantaged group of women to find employment	Set up health organisation with focus on addressing mental health in the developing world
Scope and Scale	Mostly engaged in small scale activities in her local community	Mostly operating in the London area with aspirations to expand to national operations	Large scale international organisation; already worked with 85,000 people and planning to scale again
Legal Form	Unincorporated	Formal	Formal
Role of SE activity in their lives	Motivated by personal experience of war in her country of origin and as a victim of racial abuse	Had abandoned a high-flying career after falling very ill and decided to spend the remaining lifetime on something more meaningful	Combined his interest in the developing world, where he spent large stretches of his life, with his experience in setting up and running organisations
Attitude towards Risk	Strong risk taker	Calculated risk taker	Strong risk taker

Source: qualitative data

Chapter 4 discussed the typology of social entrepreneurs by Zahra *et al.* (2009), in which the authors also identify three types of social entrepreneurs. They differentiate between ‘social bricoleurs’, ‘social constructionists’ and ‘social engineers’, whose activities range from addressing small-scale ‘local social needs’ to introducing large-scale ‘revolutionary change’. Although this typology was criticised for being insufficiently based on empirical research, the analysis of the qualitative material identified a number of categories that had both similarities and differences with Zahra *et al.*’s (2009) typology. Almost half (10) of the 21 interviewees carried characteristics that matched to the ‘social bricoleur’ type (see Table 3.2 in Section 3.3.4), such as the local focus and small scale of their activities, as well as the fact that they were focused on helping the ‘hard to reach’, addressing problems neglected or not on the radar of more formal policies and support mechanisms. However, whereas Zahra *et al.*’s ‘social bricoleurs’ are small by choice, ‘Volunteer Activists’ were often small due to structural factors, notably by being constrained due to limited access to resources.

Table 6.3: Overview of Interview Participants

Type	Name	Sex	Age	Ethnicity	Education	Activities	Sector	UnLtd Award	SE Involvement
Volunteer Activists	Tom	M	53	Asian-British	Degree	Travellers community; raising awareness, fighting prejudices; arts	Community/Arts	Yes	part-time
	Agnes	F	54	Black-British	NVQ4	Ethnic/cultural community; women; traditional crafts	Community	Yes	
	Audrey	F	57	Black-African	Diploma	Ethnic/cultural community, traditional dances	Community	No	
	Elizabeth	F	71	Black-Caribbean	Professional Qualification	Ethnic/cultural community; fighting against discrimination	Community	Yes	
	Betty	F	63	White-British	Postgraduate Degree	Learning disabilities, social exclusion	Health/Community	Yes	
	Steve	M	51	Mixed-Other	Degree	Education; children; disadvantaged communities	Education/Community	No	
	Phillip	M	55	White-British	Degree	Education; childcare; training	Education	No	full-time
	Lara	F	63	Mixed-Other	Postgraduate Degree	Education; children; disadvantaged communities	Education/Community	Yes	
	Patricia	F	56	Black-African	Postgraduate Degree	Health; ethnic/cultural community; women	Health/Community	Yes	
	Victoria	F	70	White-British	Degree	Environment; support to find employment	Environment	No	
Rationalising Professionals	Catherine	F	63	White-British	Postgraduate Degree	Local community; time bank	Community	Yes	part-time
	Tracey	F	60	White-British	Degree	Violence prevention in the community	Community	Yes	
	Adam	M	64	White-British	Postgraduate Degree	Support to find employment	Employment	Yes	
	Andrea	F	57	White-British	A-Levels	Women, social exclusion; support to find employment	Employment	Yes	full-time
	Lisa	F	54	Black-African	Foundation Degree	Support to find employment	Employment	Yes	
	Peter	M	57	White-British	Degree	Music; disability; social exclusion	Arts	Yes	
	Paul	M	58	White-British	Professional Qualification	Arts; mental health	Arts/Health	No	
High Aspirers	John	M	57	White-Other	Degree	Environment; disadvantaged communities	Environment/Community	No	part-time
	Jack	M	60	White-British	Degree	Community cohesion; social exclusion; IT/Media	Community/IT	No	full-time
	Bill	M	62	White-British	Postgraduate Degree	Mental health	Health	No	
	Robert	M	65	White-British	PhD	Fairtrade	Arts	Yes	

The 'Rationalising Professionals' and 'High Aspirers' can be described as hybrid types between Zahra *et al.*'s (2009) 'social bricoleurs' and 'social constructionists' and between 'social constructionists' and 'social engineers'. Hence, whereas the 'Volunteer Activists' formed the category least likely to be identified as the 'heroic entrepreneurs' of the entrepreneurship literature, the 'High Aspirer' type was closest to the high-flying 'social engineer' described by Zahra *et al.* (2009). Although the 'High Aspirers' exhibited some characteristics of the 'social engineer' (or the Schumpeterian entrepreneur), given their aspirations to grow and to maximise their contributions to social change, Zahra *et al.*'s rather extreme, somewhat idealised, third type would not have been an appropriate description of them and can be expected to be very rare, given that the 'High Aspirers' identified in this study already comprised the smallest group in the sample.

Furthermore, the typology aims to transcend the simplistic discussion of 'heroes' and 'non-heroes', reviewed in Chapters 2 and 3, by demonstrating the more nuanced reality of social entrepreneurs and actual practices on the ground. It reflects the considerable range of activities involved, what social entrepreneurs bring to the activity and what benefits they gain from it themselves. Furthermore, it shows the many different nuances to how 'success' is recognised and judged by different participants. Although scope and scale of activities were important characteristics of the types identified in this study, rather than measuring success by the scale of the social/economic impact of a social enterprise, the typology recognises that some social ventures are focused on creating small scale, often localised, impacts which may be difficult to quantify and where scaling is not an objective. The data revealed the need to view these categories more holistically and to recognise that the boundaries between types are fluid. It therefore contributes to understanding of different groups of (older) social entrepreneurs, and how some support needs are more likely to occur for one type than another.

The findings also contribute to understanding of risk in SE. Although the study provided evidence for the influence of individuals' willingness to take risk on their social entrepreneurial motivations, it also reveals the need for a more holistic understanding of risk that includes dimensions such as physical, professional, reputational and emotional risk. These dimensions can play an equally or even more important role in relation to SE than does financial risk.

The typology also responds to overly simplistic conceptions which treat economic and social values as opposites (e.g. Dees *et al.*, 2001). The spectrum of social entrepreneurial activity integrated in this typology aims to emphasise that a combination is possible at both ends,

however with different emphases. This view implies a conception of entrepreneurship beyond a *narrow* economic discourse, adopting a wider social sciences perspective of what ‘economic’ (Doorman, 2000) and ‘entrepreneurial’ (Steyaert and Katz, 2004) entails. Whereas the majority of ‘Volunteer Activists’ are entrepreneurial with less focus on monetary outcomes (**social** entrepreneurship), ‘High Aspirers’ see financial value creation as crucial for achieving the greatest possible social impact (social **entrepreneurship**).

The typology captures the ‘reality’ of participants’ social entrepreneurial activity at the time of the first qualitative interview. However, as the follow-up interviews have demonstrated, their activity is dynamic in nature and cases can shift between types over time due to changes in personal circumstances and opportunities. For instance, new life stages and pivotal experiences can trigger shifts in motivations, including value priorities. From a life course perspective, the boundaries between types are therefore blurred and subject to change.

This and the following chapter have different roles in the presentation of the findings. This chapter discusses OSEs in terms of their demographic characteristics, the nature of their SE activities, how they operate, and their self-identity as social entrepreneurs. In the following sections, which are structured around the different research questions set out at the beginning of this chapter, the three types will be explained in greater detail.

Chapter 7 will take the reader one step back. Although the typology is a simplified picture of how variations in structural factors and personal background shape the nature or level of involvement in SE, it has been developed in the light of an in-depth analysis of participants’ individual backgrounds, pathways into SE, as well as of how motivations were shaped by individual life courses. Chapter 7 will provide a detailed discussion of these findings.

6.2.3 Demographic Profile

The first factor identified to inform the typology was the socio-demographic background of the participants. The aim of the analysis in this section is twofold. First, drawing on the quantitative data, it will present the demographic characteristics of the UnLtd AWs. Second, the data is examined using the typology derived from the qualitative data. The insights gained will be used to underpin the analysis in the following sections, as well as the role of participants’ personal backgrounds on their SE motivations in Chapter 7.

Table 6.4: Demographics of UnLtd AWs

<i>Age</i>		<i>50+</i>	<i>18-49</i>
(n=5426)		18%	82%
Female		53%	49%
Male		47%	51%
Minority Ethnic		14%	26%
Degree Level	Education	43%	52%

Source: data base of UnLtd AWs

Table 6.5: Demographics of Interview Participants

<i>Type</i>		<i>Volunteer Activist</i>	<i>Rationalising Professional</i>	<i>High Aspirer</i>	<i>Total</i>
Number of Cases (n=21)		10	7	4	21
Female		7	3	0	11
Male		3	4	4	10
Minority Ethnic		7	1	0	8
Degree Level	Education	7	4	4	15

Source: qualitative data

Female 50+ Social Entrepreneurs

The sex representation of OSEs is of special interest, as female participation is similar to men's⁴². In 'mainstream' entrepreneurship, on the other hand, female participation (5%) is half of that of men's (10.2%) (Levie and Hart, 2012). Amongst UnLtd's 50+ AWs, 53% were female (compared to an equal sex distribution of AWs generally). This finding is supported by Levie and Hart (2011) who found that 46% of their sample of social entrepreneurs (n=208) were women (compared to 27% in 'mainstream' entrepreneurship). Therefore, the female pattern of involvement in SE shows more resemblance to volunteering, where women are also more likely to be involved than men (ONS, 2009b).

This can partly be explained by the fact that the population becomes more and more female with increasing age due to higher female life expectancy at birth (ONS, 2011; Walker and Walker, 2005). Nevertheless, this finding provides some support for the proposition, made in

⁴² There were no statistically significant differences in participation between male and female AWs.

Chapter 3, that women are more comfortable with social than with 'mainstream' entrepreneurship. The fact that seven out of the ten 'Volunteer Activist' cases were women, whilst the 'High Aspirers' were all men, indicates that women might prefer forms of SE which emphasise 'social' rather than 'financial' dimensions of value creation, and which are, hence, more similar to volunteering. In addition, three women and three men had previous experience in 'mainstream' entrepreneurship, but whereas the women were either 'Volunteer Activist' (1/3) or 'Rationalising Professional' (2/3) social entrepreneurs, all three men were in the 'High Aspirer' category. In this context, one of the female 'Volunteer Activists' stated that she had attempted to run her own business all her life, but that she had failed mainly because she was not interested in adding a financial dimension to her activities.

However, the questions of what leads to the strong representation of female social entrepreneurs and what they think they can get out of SE that they do not find in 'mainstream' entrepreneurship will need further testing in future research.

Ethnic Background

People from an ethnic minority background (14% of UnLtd's OSEs) are much better represented than in the UK 50+ population (5%) (ONS, 2010a). This ratio is comparable to that of UnLtd's younger ethnic minority AWs and the UK population (about 3:1), as well as to Levie and Hart's (2011) findings on the proportion of minority ethnic social entrepreneurs (13.2%). Overall, 34% of UnLtd AWs live in the most deprived areas of England, Scotland and Wales (Burnell and Gabriel, 2012), where the proportion of ethnic minorities is higher than in more affluent areas (Levie and Hart, 2011; Syrett and North, 2008)⁴³. Although their proportion is slightly higher in 'mainstream' entrepreneurship (14.8%) (Levie and Hart, 2011), research has found that people from minority ethnic groups are often pushed into self-employment due to limited alternative opportunities in the labour market (Baycant-Levent and Nijkamp, 2009). In line with recent research on ethnic minority SE (Calvo, 2012), this study found that all of the participants from an ethnic minority background had become involved in SE due to their motivations (see Chapter 7) rather than as a 'last resort' as discussed in Chapter 4.

⁴³ The fact that a relatively high proportion of AWs comes from deprived communities is partly due to UnLtd programmes focused at promoting social entrepreneurs in these areas (e.g. the 'New Cross Gate Programme' and 'Sport Relief' for young people and, most recently, 'Big Local', see <http://unltd.org.uk/> for more information).

Seven of the eight interview participants from a minority ethnic background belonged to the 'Volunteer Activist', and one of them to the 'Rationalising Professional' group. This may be due to the composition of the sample with six out of the eight interviewees being female. It is striking that most of those in the 'Volunteer Activist' group were women from an ethnic minority background, whereas the 'High Aspirers' consisted of white men only.

As pointed out in the previous chapter, according to the Citizenship Survey 2009-10 (ONS, 2010b), people from minority ethnic groups are less likely to be involved in regular formal or informal volunteering⁴⁴ than white groups. However, some research (Nazroo *et al.*, 2003) suggests that the amount of voluntary activity among ethnic minorities may be underestimated, as the contributions they make to their communities as part of a culture of mutual support are often ignored. The type of involvement of the participants in this study suggests the need for further research on whether ethnic minority social entrepreneurs are more likely than white groups to use their SE activity as a form of self-help. The influence of the cultural-ethnic background on participants' SE motivations will also be discussed in detail in Chapter 7.

However, it has to be noted that the representation of ethnic minorities declines amongst the 60+ age group. This finding is highly statistically significant (Chi-square, $p < 0.001$)⁴⁵ and might partly be due to the fact that the minority ethnic population has a younger age structure than the white population (ONS, 2011c). It may also be the case that their participation in the community is more likely to be involved in more hidden informal local and ethnically/religious specific activities (Nazroo *et al.*, 2003), as discussed in Chapter 4. At the same time, images of ageing, related value systems and perceptions of roles of older people in society may differ amongst ethnic minority groups and influence their nature and level of participation (Featherstone and Hepworth, 2005; Rowland, 2007). Nevertheless, the figures presented above show that SE provides an area of great potential for involvement of older people from ethnic minority groups.

⁴⁴ Regular formal volunteering is defined as giving unpaid help through groups, clubs or organisations to benefit other people or the environment at least once a month. Informal volunteering refers to giving unpaid help as an individual to people who are not relatives (ONS, 2010b).

⁴⁵ Unless otherwise stated, all the statistical tests referred to in the remainder of this chapter are based on Pearson's χ^2 test: $\chi^2 = \sum \frac{(O-E)^2}{E}$. An overview of statistical results is presented in Appendix E.

Educational Background

Some research (Levie and Hart, 2010, 2011; Shaw *et al.*, 2002) found degree level education to be a strong predictor of SE activity, “with particularly high levels of SE amongst those with Masters and Bachelors level qualifications” (Harding, 2006: 20). ‘Mainstream’ entrepreneurs, on the other hand, are more likely to be educated at GSCE or vocational education level (Levie and Hart, 2011). These findings are supported by this study.

Although UnLtd’s 50+ social entrepreneurs come from a range of educational backgrounds, a large proportion were educated to degree level (43%) or had professional qualifications (23%). This is similar to UnLtd AWs of other age groups, and also reflects existing research on volunteering and education levels (Drever, 2010). Nevertheless, this is an interesting feature, as fewer people in this age bracket will have had the opportunity to access higher education. The differences in educational attainment between OSEs and their younger counter parts are highly statistically significant (Chi-square, $p < 0.001$).

Furthermore, 15 of the 21 qualitative interview participants were educated at degree level or higher (see participant overview in Table 6.3 and Table 6.5). In addition, all ‘High Aspirer’ social entrepreneurs were educated at degree level. Those without degree level education were equally divided between the other two types.

To sum up, these statistics reveal an important finding regarding the characteristics of UnLtd’s OSEs. The demographic pattern of UnLtd’s 50+ AWs is more similar to that of volunteers in the same age group than to ‘mainstream’ entrepreneurs. However, although older people are strongly represented in volunteering (ONS, 2010b), this data suggests that they are similarly under-represented in SE activity as in ‘mainstream’ entrepreneurship (Hart and Levie, 2011). This and the fact that almost half of the interview participants could be allocated to the ‘Volunteer Activist’ type indicates that the nature of much 50+ SE activity is closer to volunteering than to ‘mainstream’ entrepreneurship. The possible reasons for this pattern will be examined in detail in Chapter 7.

This study also shows that, in line with other existing demographic information on social entrepreneurs generally (Levie and Hart, 2011), OSEs are a diverse group in terms of gender and ethnicity. As the qualitative data will reveal, they are also a diverse group in respect of their areas of activity, as well as contributions to and expectations from SE. In Chapter 3, it was discussed that (social) entrepreneurs are often presented as being part of an elite group

(Steyaert and Katz, 2004), with participants' educational attainments providing partial evidence to support this claim (Campbell, 2009).

However, one key characteristic of the 'Volunteer Activists' was that they consisted mainly of women from an ethnic minority background, providing evidence for the importance of intersectionality, or the dynamic interplay of race, class, gender and ageing (see Chapters 4 and 5), in this study. This finding supports Levie and Hart's (2011) research which found that women entrepreneurs are more likely to be social rather than 'mainstream' entrepreneurs if they reside in deprived communities (where ethnic minorities are more prevalent, see Syrett and North, 2008), suggesting that women may be motivated to become involved in social entrepreneurial activity by a desire to improve the socio-economic environment of their own neighbourhood/local community.

Given also the projected increase of their share of the 50+ population (Grewal *et al.*, 2004; ONS, 2011c), the findings of this study could be seen as leading support to the policy argument that the ethnic minority population needs to be encouraged to get involved in SE by support organisations and an enabling policy infrastructure, in order to address ethnic inequalities in quality of life at older age (Nazroo *et al.*, 2003). The 'High Aspirers', on the other hand, consisted of men only and all of them were white. There is therefore a need to explore in more detail in future research how these clusters of certain groups in certain types are explained by the combination of interacting influences, i.e. active choice and constraints faced by social entrepreneurs.

In line with theories on 'embeddedness' (Granovetter, 1985) and 'structure and agency' (Giddens, 1984) the participants' social ventures need to be seen in relation to a complex and dynamic environment, which both enables and constrains them in their work. The influence of varied contexts and the individual background on the social SE activity will be explored in more depth in Chapter 7. The following sections will now examine areas of activity, level of involvement, as well as scope and scale of 50+ SE.

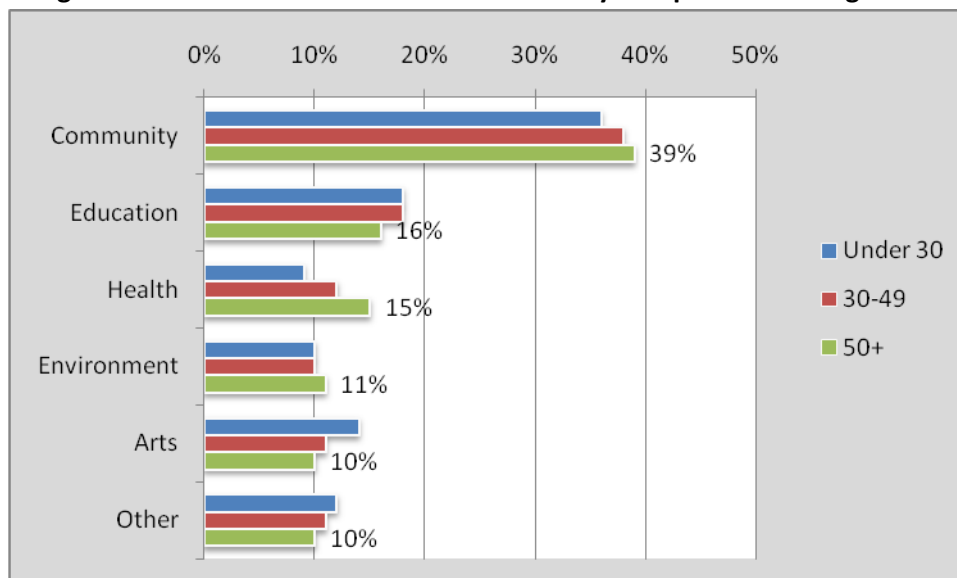
6.3 What do they do?

This section will examine the nature and sectors of 50+ SE activity, as well as the level and intensity of their involvement. In addition, it will study the scope, scale and impact of 50+ SE and discuss these characteristics in comparison to the activities of younger social entrepreneurs, as well as in relation to the SE narrative presented in Chapter 3.

6.3.1 Area of Activity

Although UnLtd's AWs were operating ventures with a wide range of activities and objectives, they were concentrated in certain sectors (see Figure 6.2). The main areas of involvement were the same as for younger AWs, with only slight variations, and there were no significant differences for those aged 60 and over. There is also considerable overlap with the areas of older people's main contributions to volunteering, such as arts, social clubs, local community or neighbourhood groups, health, disability and welfare (see also main target groups of UnLtd 50+ AWs in Figure 6.3), although activities related to religion are much less common than in voluntary work.

Figure 6.: Main Sectors of UnLtd 50+ SE Activity Compared to Younger AWs



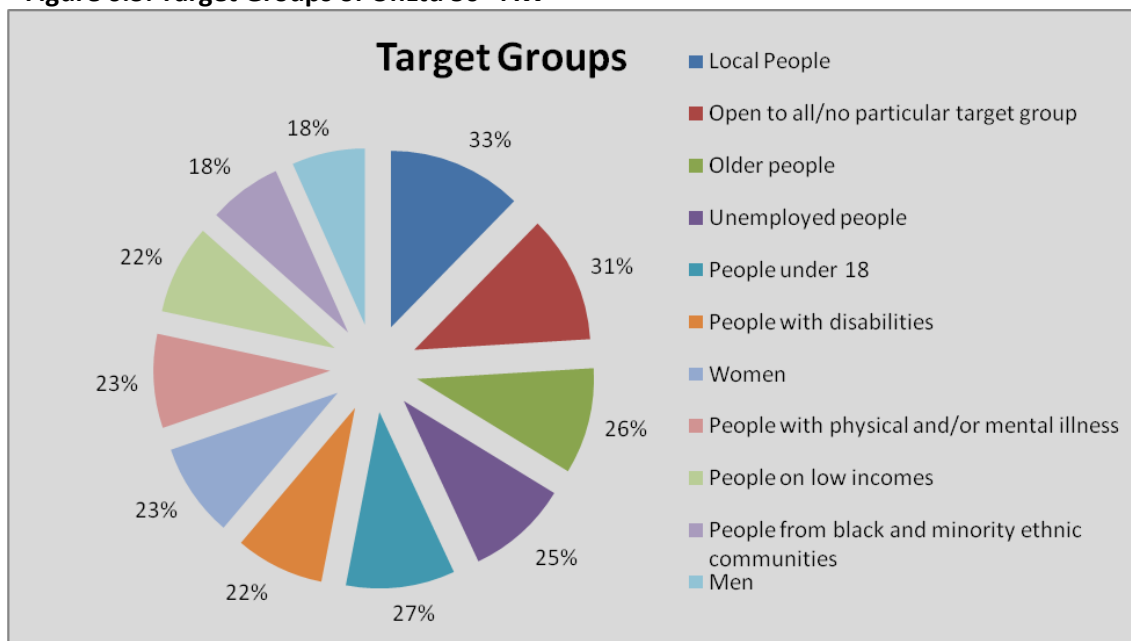
Source: UnLtd Database of AWs

As the participant overview in Table 6.3 shows, these sectors of activity were also reflected in the qualitative sample. Some examples of objectives amongst the interview candidates include:

- enhancing education of children in disadvantaged communities;
- preventing violence and anti-social behaviour in their local community;
- providing employment support to socially excluded groups;
- tackling issues faced by their cultural community, such as discrimination or health deprivation;
- providing arts projects for disabled people and to support artists in the developing world.

The main target groups of UnLtd's OSEs were the same as for AWs generally. As Figure 6.3 shows, the largest proportion of social ventures addressed the needs of local people. This was also evident amongst interview participants. 'Volunteer Activists' in particular were concentrated in activities related to their own cultural/ethnic and/or local community (see also Sections 6.3.3 and 7.2.1).

Figure 6.3: Target Groups of UnLtd 50+ AW



Source: UnLtd Annual Survey 2012

Whereas interviewees were no more likely to tackle issues related to ageing or the challenges of an ageing society, discussed in Chapters 1 and 4, than other social needs, older people were a key target group of 50+ UnLtd AWs who participated in the Annual Survey 2012. Amongst respondents over 50, 26% were targeting the needs of older people through their venture, compared to 15% of their younger counterparts. However, this finding can partly be attributed to UnLtd's tailored programmes⁴⁶ with an ageing focus. For instance, in a recent support programme for OSEs, one third of AWs addressed issues relating to an ageing society for their focus (Stumbitz *et al.*, 2012). At the same time, this figure is comparable to that in volunteering where 28% of people over 50 are involved in activities addressing the elderly.

Nevertheless, there were examples of projects in the qualitative sample that addressed ageing issues, with aims to, for example:

- provide employment support for people over 50;
- build intergenerational collaboration to reduce isolation of the older while passing on cultural skills and traditions to the younger.

Other ways in which the SE activity can contribute to tackling issues of an ageing society, such as improving the social entrepreneur's own quality of life, will be discussed in more depth in Chapter 7.

To sum up, interviewees were involved in a range of activities but with a notable cluster of minority ethnic women running projects addressing issues faced by their own cultural community. Chapter 7 will explore this pattern in greater detail. The following section examines variations in levels of involvement in SE activity.

6.3.2 Level of Involvement

Participants' level of involvement depended on the role of SE in their lives and, relatedly, the time available. Nearly half (10) of the 21 interviewees were working on their social initiative full-time, eleven of them part-time (see Table 6.6).

⁴⁶ UnLtd's current or recent programmes with an ageing focus include (see also <http://www.unltd.org.uk>): 1.) The Bradford Older People's Pilot programme – this programme supported 18 social entrepreneurs aged 50+; 2.) The Engage England and Wales programme, focused on 30 social entrepreneurs aged 16+ whose projects address issues of an ageing society; 3.) The Ignite programme in Northern Ireland, which will ultimately support over 100 social entrepreneurs aged 50+.

Table 6.6: 50+ SE Activity – Level of Involvement

	<i>Volunteer Activist</i>	<i>Rationalising Professional</i>	<i>High Aspirer</i>
Number of Cases (n=21)	10	7	4
Level of Involvement			
Part-Time	7	4	1
Full-Time	3	3	3

Source: qualitative data

Whereas the majority of ‘Volunteer Activists’ were pursuing the activity part-time (7/10), the majority of ‘High Aspirers’ were involved full-time (3/4). The ‘Rationalising Professionals’ were almost equally divided between part-time (4/7) and full-time (3/7) participation. For instance, the intensity of Andrea’s (‘Rationalising Professional’) full-time commitment is demonstrated by the following:

My family will tell you – it’s 24/7. Um, I’m pretty obsessive about it and I very rarely take a day off. I’m actually in the office eight hours a day, and I go home, make sure my daughter is doing her homework, get dinner ready, and then I usually go back and do some more work before I go to bed. (Andrea – support for disadvantaged group of women)

However, the time commitment varied considerably, with some part-time social entrepreneurs working on their ventures in the evenings alongside their day-jobs, and others running an event every other weekend. As suggested by Zahra *et al.* (2009), particularly amongst the ‘Volunteer Activists’ involvement was a lot more sporadic than in the other categories. Exceptions to this included, for example, Victoria (‘Volunteer Activist’), who was running a work-integration social venture on which she worked “seven days a week and at least 10 or 12 hours a day”. The ‘High Aspirers’ tended to be ‘all consumed’ by their SE activity which meant sacrifices in relation to other commitments (e.g. family life and, in the only part-time case, other self-employment).

Five participants were running a portfolio of ventures; two of them were ‘Rationalising Professionals’, three ‘High Aspirers’. None of them were ‘Volunteer Activists’ and four of them were men. John (‘High Aspirer’), for instance, was running his own for-profit accountancy business, a social enterprise consultancy, and was planning to set up another, environmentally focused, social venture. As he explained, “I’ve worked for myself for 30 years, so I’m quite used to being very busy. I always work six days and have one day off a week and I do things with my

family on that day". Another example is provided by Bill ('High Aspirer'), who was running a for-profit business consultancy and involved in several social enterprises at the same time:

Over my life, I've started nine organisations, of whom I have directed three, many of the others I have run... [...] I have put a number of charities into place which I happen to be in the governing body of and [...] in the case of a number of others, I have been the actual director as well as the actual founder. (Bill – 'High Aspirer' – Health Organisation)

As discussed in Chapter 4, research on older volunteers has found that they spend more hours volunteering than their younger counterparts (Rochester and Thomas, 2006), suggesting that the older age group may also have more time for SE involvement. This study, however, found no significant differences in time commitment to younger AWs.

According to UnLtd's survey data, the majority of 50+ AWs (51.8%) spends between 11 and 39 hours on their venture each week, 26.7% spend less than 11, and 21.5% work on it more than 40 hours per week. This result contrasts with research by Levie and Hart (2011) who found that the majority (73.7%) of social entrepreneurs were involved in SE activity less than ten hours per week, and only 5.5% work for more than 40 hours per week. These contrasting findings may be due to the wider definition of SE used in Levie and Hart's (2011) research, which is more likely to also include voluntary activity.

The participants' pathways into SE will be discussed in more depth in Chapter 7. Whereas some of them had been running their SE activity for many years, others had become involved more recently. However, all ventures had been active for more than three years. There was no difference in length of involvement between 'Volunteer Activists' and 'Rationalising Professionals'. All 'High Aspirers', on the other hand, had been involved in SE since early adulthood or had had leading roles in the charity sector before starting their SE activity.

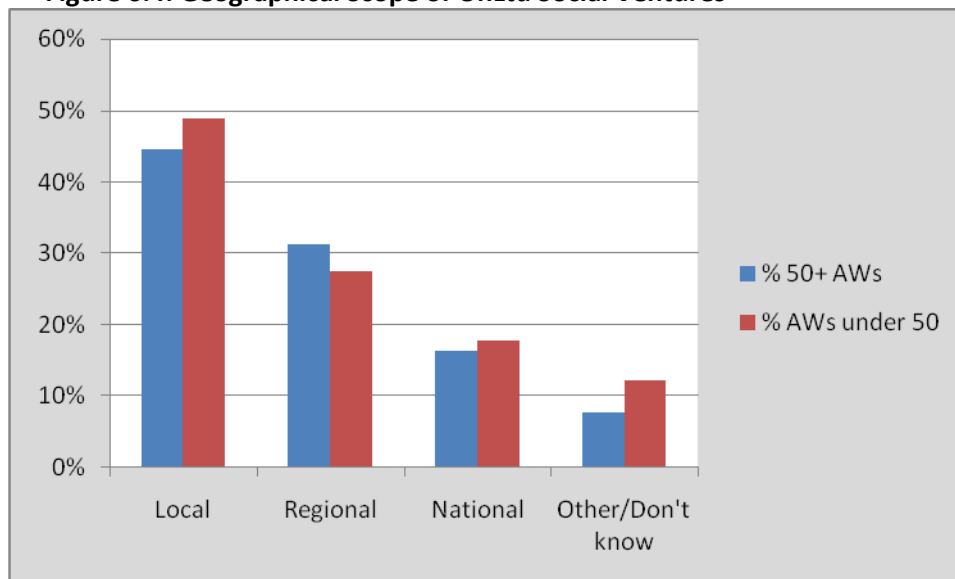
The cases reported here also show that older people are more likely to become involved in SE activity if they have previous experience in volunteering. Only two of the interviewees started third sector activity after 50; almost half (10/21) of them had a long history of volunteering in the charity sector. This relationship and the participants' reasons for setting up their own social ventures will be further explored in Chapter 7.

6.3.3 Scope and Scale of Social Entrepreneurial Activity

The findings related to the scope of SE activities fit the narrative of social entrepreneurs tending to address local social needs (Shaw and Carter, 2007; Shaw, 2004). The 'Volunteer Activists' were most likely to be operating at a local/cultural community level. The 'Rationalising Professionals' were operating at local/regional level and 'High Aspirers' at local to international level. Two of the four 'High Aspirers' were operating internationally, and two of the seven 'Rationalising Professionals' were working on developing international links.

This pattern is also broadly reflected in UnLtd's Annual Survey 2012 (see Figure 6.4) and there were no statistically significant differences in respect to geographical scope between age groups.

Figure 6.4: Geographical Scope of UnLtd Social Ventures



Source: UnLtd's Annual Survey Data 2012

The initiatives run by 'Volunteer Activists' were mostly small-scale, either by choice or due to constraints which they had not been able to overcome. In three cases, the fact that participants were combining their part-time SE activity with paid employment, would have made it difficult to expand their social venture at this point in time. Six of the ten 'Volunteer Activist' cases had obtained a small Level 1 grant (see 5.5.1) from UnLtd to set up their venture. However, the key challenge identified amongst this group was lack of funding, either due to limited experience and confidence in preparing funding bids, or due to the unavailability of funding sources targeted towards the specific need they were addressing (see

Section 6.4.3). In any case, the fact that these ventures were either generating no or limited income through trading and that they had difficulties accessing external funding put their ongoing viability at risk:

At the moment I'm only giving myself to maybe end of the year, February-ish, if no funding has come through, then probably I'll just close the shop and then get myself another job and move on... because you can only do so much for a certain period of time. I also need to pay my mortgage... (Patricia – 'Volunteer Activist' – health project for the local cultural/ethnic community)

There is so much to give, so much to give to the children, but as you know, for everything you do, you need a little bit of funding. We don't need a big amount, at least a little bit. Because we really funded it ourselves, but we can't continue... it becomes a problem for everybody, you know. (Lara – 'Volunteer Activist' – venture offering creative teaching to children in deprived local areas)

As in the case of younger UnLtd AWs (see Stumbitz *et al.*, 2012), the majority of the impacts involved were at a highly localised level, within the neighbourhood or borough where 'Volunteer Activists' lived.

In the case of the part-time 'Rationalising Professionals', small scale social ventures were primarily small by choice, in order to be manageable alongside other commitments such as part-time employment. For instance, Catherine ('Rationalising Professional'), who was running a time bank in her local community, viewed her SE activities mainly as a retirement hobby and she wanted to leave enough time for family and leisure. As she pointed out, *"sometimes it's a bit overwhelming and it becomes quite full on... Sometimes it's just so much like being back at work but for no pay that I wonder why I do it at all"*.

The four 'High Aspirers' were all running organisations of medium to large scale, with aspirations to grow further:

We've already gone to scale; we've already worked with 85,000 people. [...] In most of the voluntary sector, we're thinking that's already scale... and I'm now going to go through social franchise to scale again. And so that's great, and people are fascinated to see if it works, if we're able to make it happen. (Bill – 'High Aspirer' – internationally operating mental health organisation)

According to UnLtd's Annual Survey 2012, 57.3% of OSEs were planning to grow or replicate their social venture to create regional, national or international impact. However, they were less likely to have plans for scaling than their younger counterparts (65.5%). These differences between age groups were statistically significant (Chi-square, $p < 0.05$).

As this section has shown, the reasons given for not scaling were varied and included time constraints, lack of funding and being focused on addressing a small scale local need. However, as Chapter 7 will show, motivations with respect to growth also have to be seen in the context of participants' life stage. In any case, the scope and scale of a social venture are also directly linked to how it is operated.

6.4 How do they operate?

As pointed out in Section 6.2.2, all interview participants emphasised social objectives as their main priority. However, these differences in motivations (which will be discussed in depth in Chapter 7) resulted in variations in the extent to which participants sought, for instance, to also generate income through trading, whether a personal income was drawn from the SE activity, and, relatedly, the degree of formalisation involved. This section will demonstrate how these variations are reflected in the spectrum of 50+ SE activity looking at their legal form, venture funding, the use of staff and volunteers, as well as the role of teams and networks (see Table 6.7 for an overview).

Table 6.7: 50+ SE Activity – How do they operate?

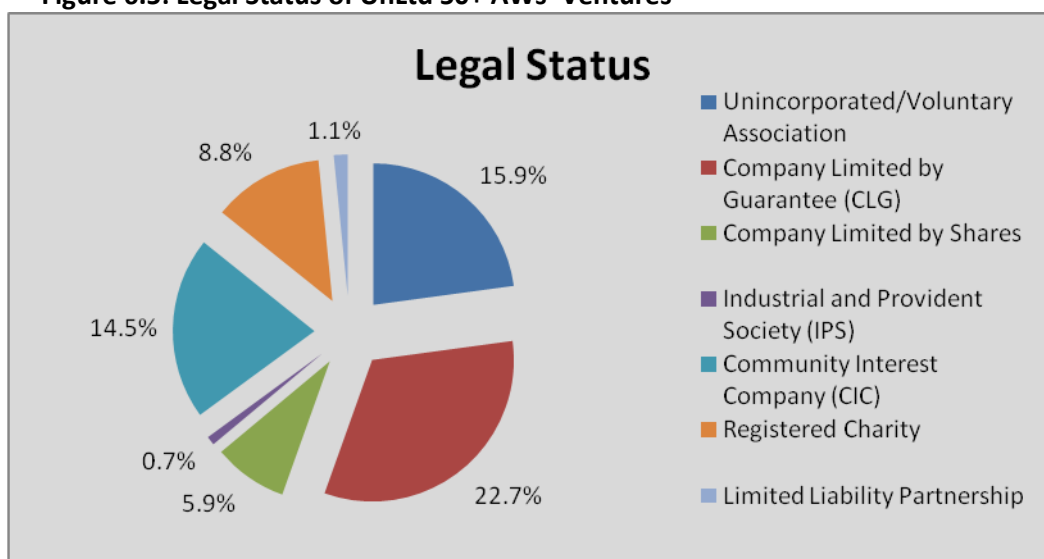
Type	Volunteer Activist	Rationalising Professional	High Aspirer	Total
Number of Cases	10	7	4	21
Venture Funding				
Trading	2	4	4	10
Grants	8	7	2	17
Personal Finance	3	0	1	4
Personal Income Source of OSE				
SE Activity	-	4	2	6
Other Employment	3	3	1	7
Pension	2	1	1	4
Other (e.g. benefits, partner's income)	4	-	-	4
Staff and Volunteers of the Social Venture				
Employed Staff	2	4	4	10
Volunteers	7	5	3	15
Ventures with Leadership Teams	2	2	2	6

Source: qualitative data

6.4.1 Legal Form

Amongst the 'Volunteer Activists', only those three ventures which were operating full-time had adopted a legal form. In the other seven cases the initiatives were unincorporated. Ventures run by 'Rationalising Professionals' and 'High Aspirers', on the other hand, (almost) all operated under a legal form, apart from one ('Rationalising Professional') case who was in the process of formalisation. The legal forms adopted included, in order of frequency, charities (mostly with trading arms), CLGs, and CICs, and hence broadly represented the legal forms used by UnLtd's 50+ AWs (see Figure 6.5). There was no significant difference in legal status adopted between OSEs and their younger counterparts. In one ('High Aspirer') case, the participant operated one SE activity in his portfolio as a branch of his private sector organisation. However, at the time of the interview, the participant was also working on setting up another venture for which he was planning to adopt a legal form commonly associated with the third sector.

Figure 6.5: Legal Status of UnLtd 50+ AWs' Ventures



Source: UnLtd Annual Survey 2012

Box 6.1 gives two examples of participants who had chosen to operate as a CIC, a legal form specifically developed for social enterprises in 2005/06 (see Section 3.5.1) and provides insights into why they chose this organisational form. Both cases emphasised that they experienced difficulties in obtaining funding which they attributed to a limited knowledge and

understanding of CICs amongst funders and related distrust towards this legal status. These issues will be discussed in more depth in Section 6.5 in the context of participants' identity with the language of SE.

Box 6.1: The CIC Experience

Robert ('High Aspirer'), who was running a fair-trade organisation, and his founding team members had opted for the CIC legal form for the following reasons:

*[...] we were essentially going to be trading; we were selling [a product]. In order to do it through a charity you had to have a separate trading company and you couldn't have the same people managing the trading company as were trustees of the charity. [...] The only way we could set it up as a charity was either that we became trustees of the charity and got someone else to run the business... but **we** wanted to run the business. But if we wanted to run the business and to be a charity you had to have a board of trustees and [...] they would start telling us what to do and we didn't want that either. It just seemed an unnecessary further layer of bureaucracy so we abandoned that and that's when I heard about CICs. (Robert – 'High Aspirer')*

In relation to their experience of being a CIC, Robert explained as follows:

It was early days for CICs and we went for it and I have to say it has been quite disappointing in some ways... but it was the right decision nevertheless. And it was only disappointing because we were amongst the earliest CICs and nobody understood them and I think people still don't understand CICs in the funding world. I think there is a big job to be done to change the mindset of major foundations and grant funders that have this complete obsession about only funding registered charities and a lot of that I think is to do with risk avoidance. There is a belief that it is safe because charities are well regulated and it is the old British thing that business is kind of dirty and risky and people are going to run off with your money and not be responsible. (Robert – 'High Aspirer')

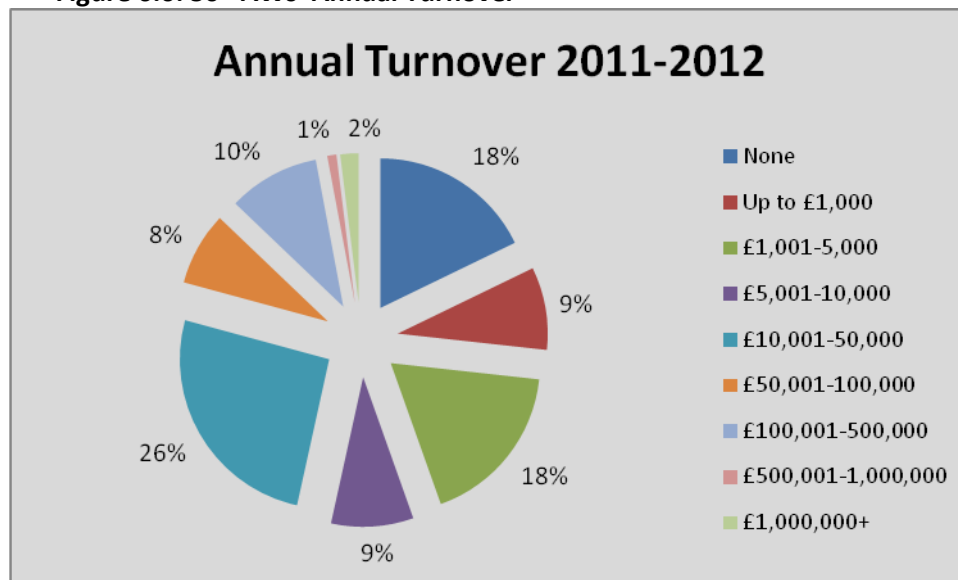
Andrea's ('Rationalising Professional') social venture was helping a disadvantaged group of women to find employment. Her experience had been similar, and she felt that operating as a CIC had been more constraining than enabling of her SE activity:

I'm not quite sure anybody really knows what [social enterprise] means, frankly. I mean, I started off as a community interest company, because my lawyer advised me on that. It was the worst thing I ever did, because nobody ever knew what it was, and all the sort of tax breaks and things they were meant to give you never materialised. I have known a couple of charities who have turned into CICs, but they're organisations who get contracts from the government, who don't care if you're a charity or CIC... but I found it's hard enough trying to sell my story to people, but if you have to say to them 'well, I'm a CIC – community interest company', everybody goes 'what's a CIC', so if you say to people I run a charity, they understand and they realise you're not for profit. Also, if I'm asking people for money, and you say you're a charity, they understand it. Whereas, if I say 'would you give me £10 on a social enterprise'... I mean, who'd give... I wouldn't give them £10. (Andrea – 'Rationalising Professional')

6.4.2 Funding of Social Entrepreneurial Activity

As pointed out in Section 6.2.2, there was a tendency for the interview participants to focus more on social than financial value creation. This pattern is supported by UnLtd's Annual Survey 2012: amongst respondents aged over 50, 18% generated either no turnover⁴⁷ or a small venture income of up to £5000 (27%) (see Figure 6.6). There was no significant difference in venture turnover between OSEs and younger AWs. However, there were exceptions and considerable differences between OSE types and care needs to be taken not to create a false dichotomy between social and financial value. For instance, one 'High Aspirer' case had already raised over £12 million for its cause from institutional, business, charitable and high net worth donor sources, using financial value to support social value and increase social impact.

Figure 6.6: 50+ AWs' Annual Turnover



Source: UnLtd Annual Survey 2012

As the data revealed, participants' different conceptions of SE were also reflected in how the social ventures were funded. In the case of the 'Volunteer Activists', the initiatives were mostly funded through small grants (such as UnLtd's Level 1 funding⁴⁸), and only two of them (one part-time and one full-time case) had a small income from trading. They were also the group most likely (3/10) to use personal finance to fund the social venture, thus also posing severe

⁴⁷ In the context of UnLtd's Annual Survey 2012, turnover is defined as income from trading activities, grants/core funding or donations.

⁴⁸ Level 1 AWs participating in this study had received between £500 and £5,000 to help with 'turning their ideas into real projects'.

risks in relation to the sustainability of the venture. In one of the full-time cases, the lack of trading income in combination with lack of funding also meant that the only member of staff faced a high level of insecurity in relation to her ongoing employment. At the same time, however, the small scale of enterprises was a source of resilience, with initiatives able to be sustained on very limited budgets. For example, one of the ventures was financed through an annual fundraising event:

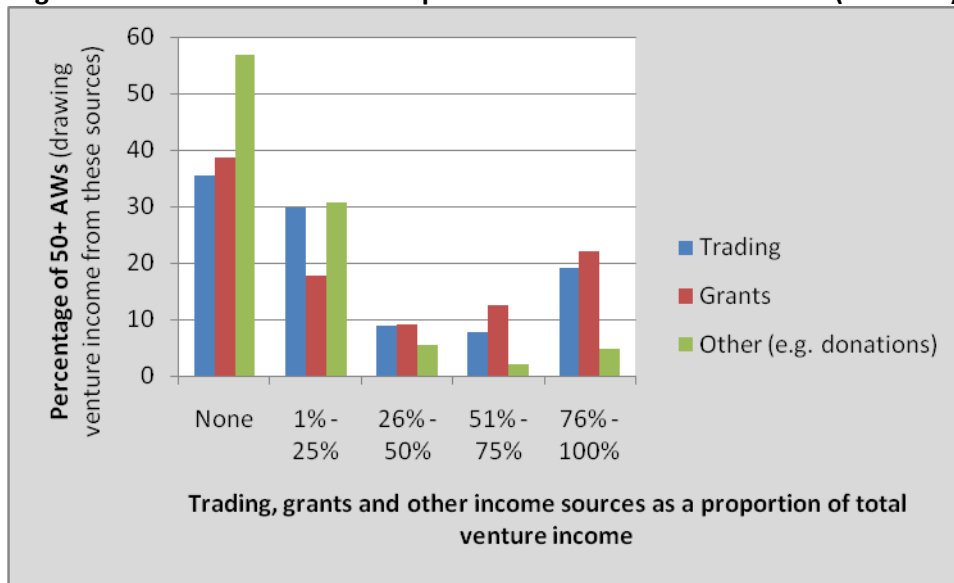
Every Easter we do a function, setting up activities, putting up different dances that people used to do at home, and sometimes a lot of people turn up for it. That's how we raise money once a year. Then we ask people to pay £10. So that way we then maybe raise £2,000 or something like that. (Audrey – 'Volunteer Activist' – cultural/ethnic community project)

The majority (4/7) of 'Rationalising Professionals' generated an income through trading and all of them were using grants to fund their SE activity. None of them were using personal money to fund the initiative. All of the 'High Aspirers' had an income from trading, and half of them also used grants to fund the organisation. Personal finance had been used in one case, but only in the start-up phase of the venture:

I have probably put about £22,000 of actual cash into [the venture] and also four years of my time. I personally would have put a bit more in but not a huge amount more in and it is a subject of ongoing debate between myself and my wife (laughter) who says come on you have put enough in in terms of time and that has been costed in with equity; you know, four years of my time you could argue is £200k if not more. (Robert – 'High Aspirer' – fair-trade organisation in the field of arts)

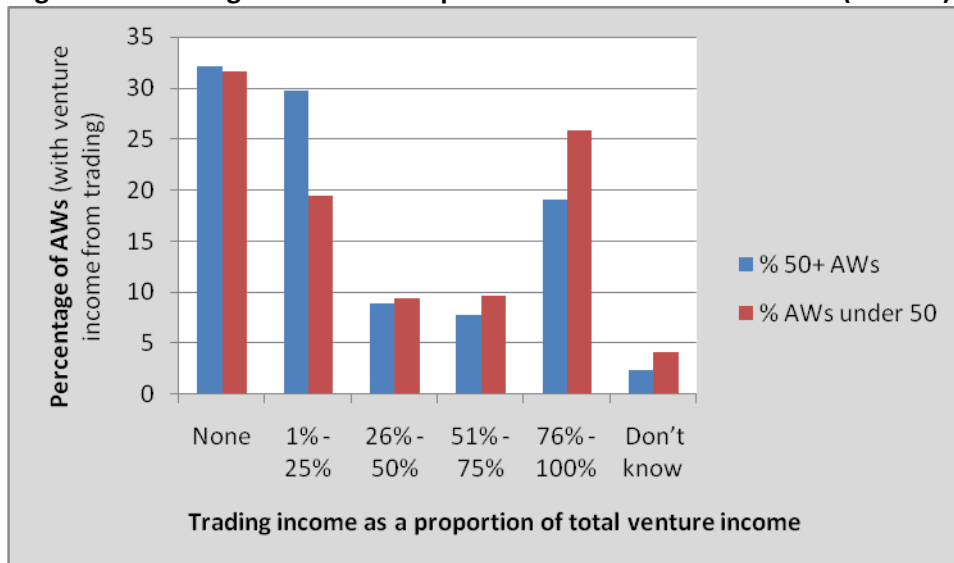
As the analysis of UnLtd's Annual Survey data revealed, 65.5% of 50+ AWs had some income from trading, 61.4% from grants, and 43.1% had other forms of income (from non-grant, non-trading sources) such as donations. However, there were considerable variations in the proportions of types of income, as shown in Figure 6.7. For instance, 30% of AWs reported that their trading income constituted less than one quarter of their venture income, and 19% of AWs generated between 76-100% of their venture income through trading activities. However, although the percentage of those having an income from trading was about the same for both older and younger AWs, the proportions of trading income varied across age groups (see Figure 6.8). In the case of AWs under 50, trading income was more likely to contribute a higher proportion to venture income than for those over 50. These differences in trading income are statistically significant (Chi-square, $p < 0.05$). On the other hand, there was no significant difference in venture funding between 50+ and younger AWs with respect to income from grants and 'other' (non-grant, non-trading) sources.

Figure 6.7: Income Sources as Proportions of Total Venture Income (50+ AWs)



Source: UnLtd Annual Survey 2012

Figure 6.8: Trading Income as a Proportion to Total Venture Income (all AWs)



Source: UnLtd Annual Survey 2012

Furthermore, only 8.8% of OSEs had secured loan or equity investment (compared to 6.4% of younger AWs), supporting previous research that found social entrepreneurs to be less likely to access conventional business loans or equity finance to fund their ventures than ‘mainstream’ entrepreneurs (Sunley and Pinch, 2012).

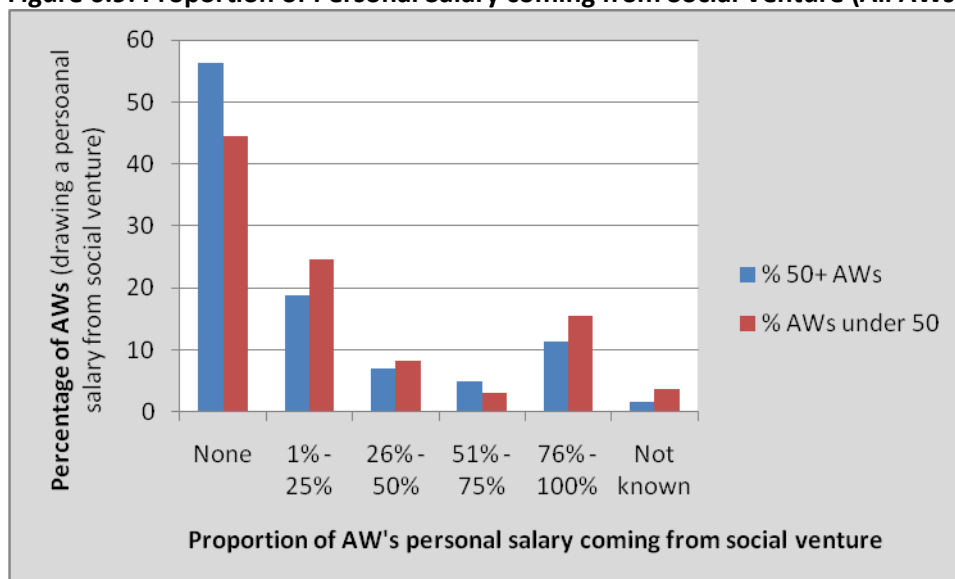
6.4.3 Drawing a Personal Salary

As discussed in the literature review, it has been argued that the older population represents a potential pool of social entrepreneurs, particularly insofar as they are more likely to have accumulated financial assets than their younger counterparts (Curran and Blackburn, 2001). This study has found mixed results in this respect.

The majority of interviewees were reliant on sources of income that were unrelated to their social ventures, such as paid employment, other self-employment activity, pension or partner's income. Only six of the 21 participants drew a personal salary from their social entrepreneurial activity; five of them were involved in SE full-time. Of these six, two were 'High Aspirers' and none were 'Volunteer Activists'. The 'Rationalising Professionals' were most likely (4/7) to use SE to provide a personal income, with three of them involved in SE full-time and this being their main source of personal income.

These findings are congruent with UnLtd's Annual Survey 2012, which found that 56% of AWs over 50 did not draw a personal income from their social venture (see Figure 6.9) and the amount drawn from the venture was most likely to contribute less than one quarter to the AWs personal income overall. Furthermore, 50+ AWs were less likely than their younger counterparts to generate a salary. Hence, OSEs tended to be reliant on other sources of income (e.g. employment, pension), as was also the case amongst the interview participants. The differences between older and younger AWs are statistically significant (Chi-square, $p < 0.01$).

Figure 6.9: Proportion of Personal Salary coming from Social Venture (All AWs)



Source: UnLtd Annual Survey 2012

Nevertheless, in two of the three full-time 'Volunteer Activist' cases, the fact that they did not use SE to generate a personal salary appeared to be undermining the sustainability of the venture (see Patricia's case in Section 6.3.3). Hence, these findings suggest that SE could be used more strategically by 'Volunteer Activists', i.e. to generate an income through trading, to help them to be less dependent on grants and to improve the sustainability of the venture (Boschee and McClurg, 2003; Bridge *et al.*, 2009). However, it also has to be recognised that such opportunities are not equally available to every OSE, as discussed in the context of critical gerontology and intersectionality (Chapter 4), as well as in relation to the nature of (quasi) markets involved (Chapter 3). For instance, it is much more likely for the private sector to successfully bid for the increasingly complex government contracts and be able to provide evidence of impact, making it much harder for small organisations (such as those led by 'Volunteer Activists' and 'Rationalising Professionals') to compete.

Furthermore, there were also differences *within* types with regard to participants' need for a personal income from their SE. For instance, although both 'High Aspirers' and having similar expectations of SE, Jack's (IT project, fostering community cohesion) full-time involvement and personal circumstances meant that he depended on his SE activity providing him with a personal income, whereas John (social enterprise consulting and tackling poverty in disadvantaged areas), who was involved part-time, was able to rely on his other, 'mainstream', venture for an income. As this example shows, although the typology makes it possible to categorise participants' SE activity to some extent, there is a need to take into account the specificities of individual circumstances and life course (see Chapter 7), as otherwise our knowledge of their SE motivations would remain incomplete.

However, it is important to note that the blurring of the division between life course stage, i.e. 'preparation for work', 'breadwinner' and 'retirement' also has consequences for people's pensions. Whereas three of the interviewees (two 'Volunteer Activists' and one 'Rationalising Professional') had been able to afford taking early retirement, another participant stated that he had never worked for the same employer long enough to qualify for a pension, and hence could not afford to retire. He was, however, rejecting the idea of using SE activity to generate a personal income, as it would not have been incompatible with his ideal of the "*selfless no benefits social entrepreneur*".

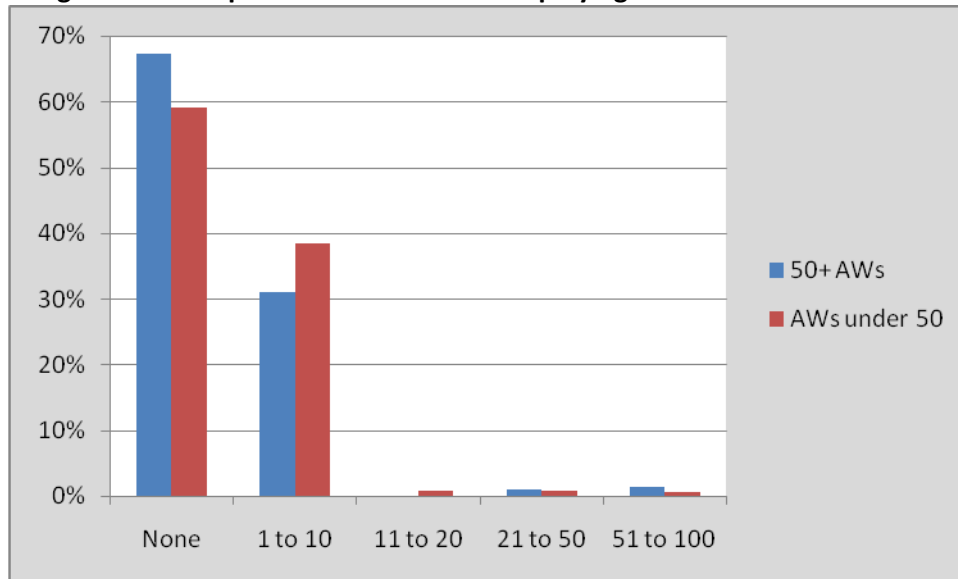
To sum up, less than one third of participants drew a personal income from SE activity and none used SE to either substitute for or to supplement a pension. This might partly be due to the composition of the sample, with those in the retired group being relatively well-off. Nevertheless, it also suggested a restricted understanding amongst this age group in particular regarding the meaning of SE and the opportunities it can provide (see Section 6.6). It could also be another possible reason for the under-representation of social entrepreneurs over 60, as not everyone in this age group can afford to work for no or little remuneration. Furthermore, the fact that some of the participants were using their pension to fund their SE activity also poses questions around the sustainability of their venture.

6.4.4 Staff and Volunteers

Given the small scale of their social entrepreneurial activities, 'Volunteer Activists' were least likely to employ paid staff, but most were reliant on the help of small numbers of committed volunteers. Over half of the 'Rationalising Professionals' and all 'High Aspirers' had paid staff, demonstrating the increasing levels of formality between types, and the majority of both groups used volunteers. However, in one 'High Aspirer' case, the organisation had 88 full-time staff, plus part-time staff and volunteers.

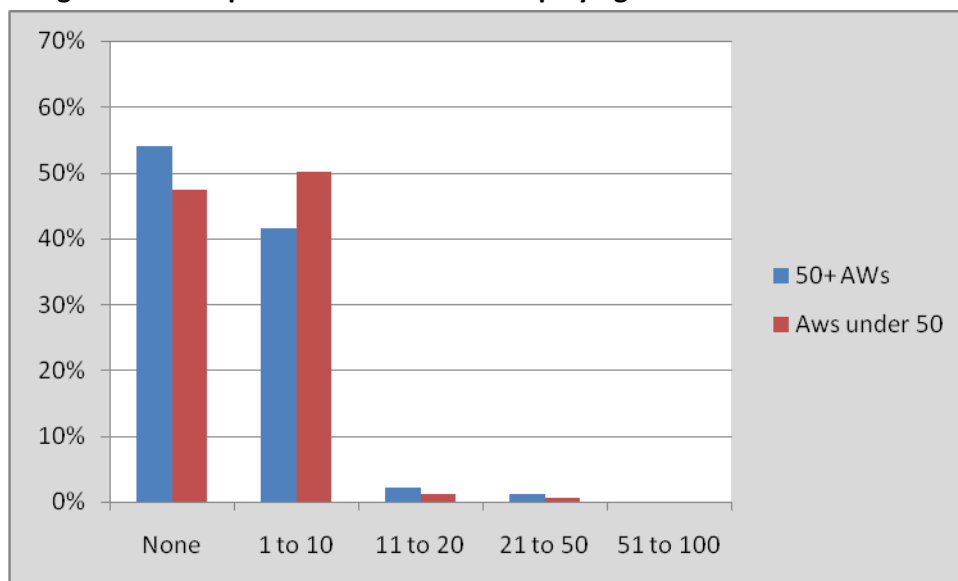
This range is also reflected in the quantitative data. According to UnLtd's Annual Survey 2012, 67.3% of 50+ AWs operated without any full-time and 54.1% without any part-time staff. AWs over 50 were more likely to operate without paid staff than their younger counterparts. As in the case of younger AWs, the majority of those ventures with paid staff had up to ten employees (31% of those were working full-time, and 42% of those working part-time), and only 1% of 50+ AWs employed over 50 full-time members of staff (see Figures 6.10 and 6.11). However, there is a higher proportion of younger AWs with up to 20 employees and a higher proportion of older AWs with more than 20 members of paid staff.

Figure 6.10: Proportion of UnLtd AWs employing Full-time Staff



Source: UnLtd Annual Survey 2012

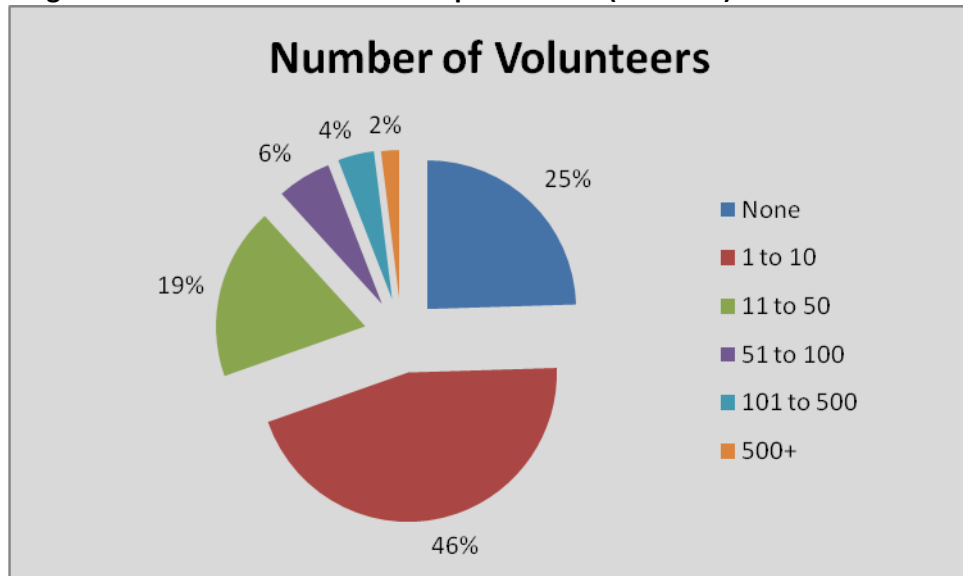
Figure 6.11: Proportion of UnLtd AWs employing Part-time Staff



Source: UnLtd Annual Survey 2012

Furthermore, as Figure 6.12 illustrates, 25% of UnLtd's OSEs were operating without volunteers and 46% had up to ten volunteers. However, at the other end of the spectrum, 2% reported having used the help of over 500 volunteers. There were no significant differences in volunteering patterns in younger AWs' social ventures.

Figure 6.12: Number of Volunteers per Venture (50+ AWs)



Source: UnLtd Annual Survey Data 2012

6.4.5 The Role of Team Leadership, Networks and Networking

Although very different issues, the relationship between networks and entrepreneurial teams and their importance for a better understanding of entrepreneurial behaviour was discussed in Chapter 2. This section explores the role of and link between teams and networks in the context of OSEs.

Teams

Studies which show that successful social enterprises are often led by teams (Spear, 2006; Amin, 2009) have been used to help deconstruct the myth of the (social) entrepreneur as 'heroic' individual by shifting the emphasis to entrepreneurship as a collective phenomenon (Johannisson, 2000).

Team leadership was a key characteristic which emerged from the qualitative interviews⁴⁹; over one third (8/21) of the participants were leading their social venture as part of a democratic founding team. In two cases, interviews were conducted with two members of the same leadership team, allowing for in-depth exploration of the nature of such teamwork. Teams could be found across types; they were, however, most prevalent amongst 'High

⁴⁹ It was not possible to obtain data on the proportion of team applications from UnLtd's quantitative data base, due to the fact that relevant data was not collected consistently over time.

Aspirers' and least likely in the 'Volunteer Activist' group. As illustrated by Robert's case (see Box 6.2), the team members took on different complementary roles and responsibilities to meet the needs of the venture, reflecting their individual skills, knowledge and experience.

Box 6.2: Example for a Team-Led Social Venture

Robert ('High Aspirer') set up and is running his fairtrade social venture in a team of three. All of them came from a different professional background and, as Robert pointed out, only their combined knowledge and skills made the venture possible. In addition, he explains how each team member has a different function by using Belbin Team Roles⁵⁰:

[Team colleague 1] has got much more practical, managerial, operational expertise. He is the 'Plodder', he will just keep on going and he will do a lot of detail and he'll plod on whereas when I get confronted with huge amount of detail it drives me round the twist. I am a big picture person and as I said a strategist. [Team member 2] as well is similar to me; he is highly creative and has a new idea every ten minutes. He is very adept also at networking and things, and I am quite good at being the 'Completer Finisher' and that was one of [team colleague 2's] weaknesses which led him to say to other people why don't you go and do it and it never happened. He didn't understand why but he didn't have that 'Completer Finisher' element. The more I think about it that is a very useful tool for some of the core skills that one needs particularly in this start up phase. So yes, we have worked very well as a team.

Networks

As discussed in Chapter 2, research findings demonstrate the importance of networks and networking for successful entrepreneurs (e.g. Conway and Jones, 2006; Shaw, 2004). The interviews revealed that the ability to draw on supportive networks with key actors was seen as enabling the SE activity, whereas the lack of such networks was seen as a considerable constraint, or major barrier for successfully putting ideas for a venture into practice. For instance, Steve ('Volunteer Activist'), who was running a creative teaching project, pointed out that he and his venture partner were lacking the links to relevant decision-makers needed to overcome institutional barriers and facilitate access to the educational sector targeted by their social initiative:

Getting resources is not the issue – the issue is access, opportunities for us to promote the project. So that would be the core need or desire that we've got at the moment. What would really help is get Lara [team partner] in contact with a group of [relevant professionals]. (Steve – 'Volunteer Activist')

⁵⁰ Identified by Dr. Meredith Belbin and defined as "a tendency to behave, contribute and interrelate with others in a particular way", Belbin Team Roles are used widely to identify people's behavioural strengths and weaknesses in the workplace (see <http://www.belbin.com>).

The nature of the networks and how they were used varied across different types of activity. For example, whereas in the case of the 'High Aspirers' professional and social networks were crucial to the running and funding of their organisations, 'the Volunteer Activists' often lacked such links and tended to rely on their social and/or cultural networks instead.

Tom ('Volunteer Activist'), who was working on a documentary on travellers, was an exception in that he drew on both his professional and social/cultural contacts:

If I didn't have the links with the people, I would never have been able to do what I have done. They are professional people and people... for instance, I can go onto a gypsy site and I can film... that could never have happened without a top gypsy representative saying 'this man is OK', and 'that is the reality'. [...] I don't have much money and all the equipment that I use is very expensive. I depend a lot on people for their good will and, if I'm doing a camera shoot, I require HD cameras which I don't have, but I know somebody that will lend me an HD camera. So, having a network of people is also good for resources. But again, all of this can only happen if you know the person well enough and they know you well enough, so that they trust you 100%. (Tom – 'Volunteer Activist' – tackling prejudices against travellers)

Given that John's ('High Aspirer') social enterprise consultancy was closely related to his for-profit accountancy business, he was able to draw on a professional network that he had built up over the past 30 years:

[The venture] is highly networked. I think that's probably the best way of explaining it. For example, although I work on my own, I subcontract specialists for different contracts with clients. So, if I need an IT expert or an HR expert... I've worked with these people for years, and marketing people, and lawyers, and all that sort of thing. So, it's a loose network of associated businesses really. (John – 'High Aspirer' – social enterprise consultancy)

Whereas participants had built up most of their networks through their professional experience and education, the data also shows that some types of networks were highly related to interviewees' cultural/ethnic and socio-economic background and therefore demonstrates the role of theories of 'structure and agency' and intersectionality in the network context. For Robert ('High Aspirer'), for instance, having been born into a particular background was a source of contacts/networks that he could draw upon throughout life, also facilitating his SE activity:

Partly age and partly being professional middle class, relatively well off with quite a wide personal social network so in terms of access to networks and people to talk to I am relatively well able to open doors and I know from my days working at a Business School that the lack of networks was a big barrier in starting up business in poor areas of the country for example. So if I was younger and perhaps not from a middle class professional background with parents who are well connected I would have struggled

with access to networks, so in that way it has been helpful. (Robert – ‘High Aspirer’; team-led SE)

The relationship between network roles and responsibilities in founding teams was discussed in Chapter 2. According to Neergard (2005), founding team members differ behaviourally in their propensities for networking, with some having extensive networking activities, while others are less comfortable networkers or even reject to become involved. Given the high proportion of team leadership within the qualitative sample and the importance of networks and networking for 50+ SE activities, this link became also evident in the interviews, as illustrated by Adam’s (‘Rationalising Professional’) case, presented in Box 6.3.

A final point of note is the increasing importance of platforms such as LinkedIn and Facebook as networking tools and the challenges that these developments in the ways people network might pose for older people (Berry, 2011), as also exemplified by Adam’s case (see Box 6.3).

Box 6.3: The Role of Teams and Networks in SE

Adam (‘Rationalising Professional’) was leading his 50+ recruitment agency together with Mary, a former work colleague. One of the main challenges they faced was to establish the links with business partners needed to make their business model work. This involved the need for skills in networking. As in the case presented in Box 6.2, Adam and his team partner brought different skills to the social venture; whereas Mary thrived on networking, Adam struggled with it:

Mary is the actress... I’ve forced myself to do some of it, but it never leads to anything. At the time, there’s all these people swapping business cards and you can end up with hundreds and hundreds of business cards, but nothing ever happens as a result, which is my incredibly cynical view of it... but it’s the sort of thing that you keep doing on a basis that maybe it’s going to work at some time or another.

The growing importance of internet based social networks can also pose a challenge for older people in particular. When seeking business support, Adam was strongly advised to use LinkedIn and facebook as networking platforms:

I was told I must join LinkedIn and then he started talking about facebook... And that’s quite hard for an older person, because - I relate to think I’m a younger older person – my instinct was to send a leaflet... And this is the hardest bit about it; it’s about realising that this is how contacts are made.

At the time of the first interview, a main issue for their team endeavours was that Mary was working in a different job full-time which had a negative influence on her time commitment to the social venture. Consequently, Adam felt he was “*doing 99% of the work*”, including tasks that he felt his team partner would have been much better at, such as networking and establishing business links. These tensions almost resulted in the social venture failing. However, at the time of the second interview, the situation had changed. Mary had been made redundant from her full-time job and, therefore, had more time to work on establishing vital links. Her changed situation thereby provided a new chance for the social venture.

The example presented in Box 6.3 also demonstrates the advantages and disadvantages of teamwork. As has been argued, whereas the availability of a larger pool of skills and expertise needed for the SE activity can be of added value, teamwork can also be constraining, particularly if not all team partners are equally committed to the venture.

To sum up, the fact that more than one third of the sample operated as part of a team, mainly 'High Aspirers' and 'Rationalising Professionals', in combination with the importance of networks in their activities, provides further support for the significance of collective action in SE. Of particular importance is the finding that team leadership was most prevalent amongst 'High Aspirers', the group which comes closest to the 'heroic' entrepreneurs described by Zahra *et al.*'s (2009) 'social engineers', as it challenges the image of the individual entrepreneur presented in the classic entrepreneurship literature.

Participants' recognition of the important role of teams and networks for their socially entrepreneurial activities is also reflected in the extent to which they accept and identify with the language of SE and perceptions of individualism.

6.5 Self Identity as Social Entrepreneurs

This section will examine interviewees' self identity as social entrepreneurs by exploring how they define the nature of their activity. Chapter 3 examined the extent to which SE is constructed through language and how the representation of social entrepreneurs within popular and policy discourse has largely been dependent on high profile successful cases rather than more balanced studies (Dey, 2010). As was also pointed out, some research (Parkinson and Howorth, 2008) has found that social entrepreneurs themselves often do not associate with the language used by policy-makers, funders and support organisations to refer to SE.

The evidence presented at the beginning of this chapter suggested that people over the age of 50 are under-represented in the social entrepreneur community. Is this really the case, or is it simply that they do not identify themselves as social entrepreneurs and are therefore not captured by many empirical studies? Maybe they use a different language and are uncomfortable with this label? This section explores these questions in more depth and will suggest that social entrepreneurs over 50 are both 'missing' and 'hidden'.

6.5.1 The Language of 50+ Social Entrepreneurs

It is important to note at this stage that 13 participants were UnLtd AWs and that they had therefore had some exposure to the discourse of SE, having responded to the organisation's call and with the 'social entrepreneur' label having been reinforced through the support and promotional process involved. Nevertheless, the interviews revealed the extent to which they self-identified as 'social entrepreneurs' to be limited. When asked how they described themselves, only five of the 21 interviewees replied 'social entrepreneur'. The other participants utilised a wide range of terms to refer to themselves and their work, such as artist, consultant, activist, or volunteer (see Table 6.8 for a comprehensive overview).

Table 6.8: Self-Identity of 50+ Social Entrepreneurs by Type

Type	Participant	How do you describe yourself?	Do you see yourself as a social entrepreneur?	Using SE terminology	UnLtd AW
<i>Volunteer Activist</i>	Audrey	Social entrepreneur	Yes	Yes	
	Steve	Social entrepreneur	Yes		
	Agnes	Project leader; volunteer	I'm not sure.		X
	Lara	Writer	I don't know.		X
	Patricia	I'm doing a public health project.	Yes	No	X
	Elizabeth	Activist	No		X
	Betty	Volunteer; community facilitator	No		X
	Phillip	Social economy consultant	No		
	Victoria	Project leader	No		
	Tom	Artist	Could be, I don't know.		X
<i>Rationalising Professional</i>	Tracey	Social entrepreneur	Yes	Yes	X
	Peter	(Community) artist	No		X
	Catherine	Active citizen	No		X
	Lisa	Advisor; coordinator	I don't know.	No	X
	Andrea	I run a charity.	No		X
	Paul	Director of an arts company	No		
	Adam	Partner in a new company	No		X
<i>High Aspirer</i>	Robert	Social entrepreneur	Yes	Yes	X
	Bill	Someone who starts charities	Yes		
	Jack	Project manager	Yes		
	John	Consultant	Yes		

As Table 6.8 also demonstrates, two broad categories emerged from the data, dividing the participants into 1.) those who use SE terminology and 2.) those who do not use SE terminology. A key characteristic is that all 'High Aspirers' made use of SE terminology, whereas 'Volunteer Activists' were least likely to do so. However, as the interviews revealed further, there were differences by type within these two themes as to how interviewees used SE language, or why they chose not to use it. In some cases, moreover, there was a mismatch between identification with and use of SE terminology (see 'Do you see yourself as social entrepreneur?' and 'Using SE terminology' in Table 6.8). This will now be discussed in more detail.

1.) Those who use SE terminology

It is striking that although about half (11 out of 21) of the participants used SE terminology, only two explicitly stated that the term 'social entrepreneur' gave them an identity. Motivations for using the term varied considerably from case to case and a number of the participants used SE language for marketing purposes, or to raise money for the initiative, but without self-identifying with the term:

[I am] an active citizen. I do sometimes [call myself 'social entrepreneur'] if called upon. [...] I will play the jargon game in fundraising, but I don't use it in my normal life. (Catherine – 'Rationalising Professional' – time bank and social inclusion arts project)

This more strategic use of the terminology was more frequent among 'Rationalising Professionals' and 'High Aspirers', but was also mentioned by two 'Volunteer Activist' cases.

Most participants in the latter category used the term in order to enable their work, however, only if used in the right contexts or situations. For example, John preferred calling himself a consultant, but explained that it was sometimes helpful to present himself as 'social entrepreneur', depending on who he was talking to:

If I'm talking to people who know what the term means and who are supportive of the term, then it's hugely helpful. Because, you immediately identify with each other; there's a kindred spirit. [However], tonight I'm going to an accountants' conference, and I will expect them to be talking purely from a practitioner point of view. They will not be thinking in social terms at all. So, for them to know that I'm a practitioner like them is the way I would present myself. (John – 'High Aspirer' – social enterprise consultancy)

All four 'High Aspirers' strategically used or did not use the terminology depending on how useful or even harmful they perceived it to be in a specific context or situation. Whereas one of them stated that the term gave him an identity, another argued that he did not think that it mattered what he called himself as *"people make up their own mind about what you are anyway"* (Jack – 'High Aspirer'). It can therefore be argued that they used the concept of SE mainly in an entrepreneurial manner, depending on the opportunities it helped to create.

However, the main reason given for not using the term in a specific context was participants' perception that other people often do not know what a 'social entrepreneur' is or does. As the next category will demonstrate, this theme of interviewees' experience of a low level of awareness among the general public of what SE means is the main reason for them not to use related terminology.

2.) Those who do not use SE terminology

In this category, the participants' attitude on the language of SE differed widely, ranging from being indifferent to strongly resistant to the terminology.

One theme that emerged primarily with 'Volunteer Activists' (4/10), but also two 'Rationalising Professionals, indicated that some participants were wary of the expectations of being a social entrepreneur and whether they could live up to these. These findings confirm concerns raised in Chapters 2 and 3 regarding the presentation of social entrepreneurs as a select elite (Steyaert and Katz, 2004). Elizabeth, for example, found the term helpful, but did not think that she met the criteria for being 'allowed' to call herself a social entrepreneur:

It is helpful, but you know,... you have to back that up, [...] and although I'm an activist and I think I'm an entrepreneur, I do not feel that I have the backing to call myself one in that sense. (Elizabeth – 'Volunteer Activist' – fighting racial discrimination)

One third (7/21) of the participants had a negative view of the term and preferred not to use it, mainly on the pragmatic grounds that it was generally not recognised and therefore not useful. Having to explain it all the time, and experience of reactions of distrust were seen as constraining and had therefore confirmed views. As Patricia ('Volunteer Activist') pointed out, *"they don't understand and they think 'oh, you're trying to run a business'. [...] So, most people don't know what a social enterprise is, they think it's all the same, working to make profits, profits... "*. Another example is provided by Andrea ('Rationalising Professional'), presented in Box 6.1 (The CIC Experience), who expressed her disappointment with the legal form which

she had been persuaded to adopt for her social venture, which only reinforces her rejection of SE related terminology.

However, as the interviews showed, the 'Volunteer Activists' had the largest proportion of cases who were unsure about the meaning themselves. The 'Rationalising Professionals' and 'High Aspirers' had a better understanding of the concept, were more confident in SE and, hence, better able to communicate their views on it.

In addition to having to explain the term all the time, Adam ('Rationalising Professional' – 50+ recruitment agency) pointed out another reason for not feeling comfortable to use it, which supports the argument, presented in Chapter 2, that particular characteristics of the successful entrepreneur as constructed in society may be alienating to some people. He was intimidated by the word 'entrepreneur' due to his negative conception of it:

I find that really quite weird, because when I got funding from UnLtd that's what they called me and when we did the launch, I always made some sarcastic, embarrassed comment about the 'social entrepreneur'. And I think, again, this comes from my background of working for someone else. And it's the entrepreneur... in my mind it's the business man who rules over people and everything else. But, if you stick the social bit in front of it, I'm not sure people actually understand what that means. So, therefore, I think I struggle with the whole idea of describing myself as that. (Adam – 'Rationalising Professional')

Paul ('Rationalising Professional'), who was leading a social venture in the field of inclusive arts, described himself as director of an arts company. He felt that a lot of his SE activity was very entrepreneurial, but argued that he did not use the terminology as it was not commonly used in his sector.

The interviews revealed further that another reason for being apprehensive about using the term was due to these participants relating the word 'entrepreneur' to making money in terms of personal profits; something their venture was not necessarily set up to achieve.

Other comments from participants included that the concept was misused, misleading, meaningless or a contradiction in itself. As Andrea ('Rationalising Professional') pointed out, "*a social enterprise is a meaningless statement, used to cover anything and everything. People will say to me 'I'm a social enterprise'... meaningless!*"

Phillip ('Volunteer Activist'), who had been active in the social economy for over 25 years, strongly resisted the term 'social entrepreneur':

I don't like the term, I don't much like the definition... I think it's lunatic, and I think it's misused. [...] it's almost a contradiction in terms. Because what does a social entrepreneur do? Goes out and finds an opportunity for themselves, which may involve a benefit to the community, but that's not why they're doing it, they're not doing it for community benefit. They're doing it for themselves! (Phillip – 'Volunteer Activist')

Phillip's case also illustrates the importance of recognising the effects that the historical context, in which an age cohort has grown up, can have on its value system (Bengtson *et al.*, 2005: 495) and, in this case, how it can shape people's conceptions of SE and whether they feel comfortable identifying with it. This will be explored in more detail in the following section.

6.5.2 Age and the Socio-Historical Context Shaping Social Entrepreneurship Identity

As discussed in Chapter 4, birth cohorts share a social and cultural history and the experience of particular events or economic and political conditions can leave lasting marks on those born in the same historical period (Bengtson *et al.*, 2005). The aim of this section is to demonstrate how such experiences can influence people's values over time, which in turn shape their motivations with respect to life course options. The last section identified a lack of self-identification with the term 'social entrepreneur' in the majority of cases, with three interviewees explicitly identifying negative connotations of the word 'entrepreneur' which they linked to Margaret Thatcher's presentation of it at the time of her tenure as Prime Minister between 1979 and 1990. For Jack, who had been active in the social economy for almost 40 years, the Thatcher years had raised an explicit ideological barrier to the cooperative approaches to addressing social problems, to which he was committed:

When the 'there's no such thing as community' kind of game began, even though she never said it, it became difficult to find people, in the young and creative, that shared the philosophy of doing the joint thing, and doing the co-op thing wasn't natural, they were all into an individual entrepreneur kind of thing. (Jack – 'High Aspirer' – IT project to improve social cohesion)

However, although research has shown that older people tend to refer to their past selves (personal identity) and life more frequently than younger adults (Dittmann-Kohli, 2005), there is also evidence that individual value orientations change throughout the life course, as influenced by their evolving cultural and social environments (Bengtson *et al.*, 2005).

This is illustrated by the cases of Phillip and Jack in Box 6.4, one of which provides an example of somebody for whom it is important to stay true to his 'old values', and the other exemplifying somebody whose value priorities have changed over time, apparently attributed to experiences in the life course.

Box 6.4: The Role of the Socio-Historical Context

Phillip ('Volunteer Activist') is an example of somebody who got involved in social entrepreneurial activity at a time which he described as *"a different era of collective and cooperative activity"*. He had been active in the social economy for over 25 years and had a strong resistance to the term 'social entrepreneur', viewing SE as being profit driven and very much about the individual rather than group efforts and anything mutual, and hence in contradiction with his values. He saw the term as being strongly associated with the political agenda of Margaret Thatcher's Conservative government. As he pointed out, *"I don't like the individualism of saying he/she is a social entrepreneur, because I think social entrepreneurialism is collective in nature"*.

Jack ('High Aspirer'), who was running an IT project to foster social cohesion, used to share some of Phillip's values, as they were prevalent in the cooperatives movement at the time. Nevertheless, his value priorities had subsequently changed as a result of his experiences:

I gave up my co-operative ethos, because I saw co-ops tear themselves to pieces too much. I mean, a whole viable business can be torn apart because people don't like each other. This struck me as insane! You employ somebody else and you watch them bring down the organisation, because they've got the right, effectively, to do it.

However, although having become more pragmatic about SE, Jack continued to be motivated by the purposes of mutual benefit and collective action. He was still very locally active in the social economy and described himself as one of the main players in the borough. Phillip, on the other hand, was very constrained in his role (as voluntary director of a charity) by holding on to his old views which were often not supported by others. As he said, *"I think some [people on the committee] would in some ways rather I wasn't there and find me a little overbearing perhaps and pedantic about some things, but they need the expertise"*.

In this study, it has not been possible to compare the findings regarding participants' use of 'SE language' with younger social entrepreneurs, as no related data was available on those under 50. Hence, it is unknown if and how the use of language differs between age groups. However, two participants made a link between the language of SE and age, and thereby hinted at a theme that might partly explain the apparent under-representation of older people in SE. Paul ('Rationalising Professional' – inclusive arts project) felt the term 'social entrepreneur' was reserved for younger people, and Bill ('High Aspirer' – mental health organisation) pointed out that the usefulness of the term depended on the age of the people they were talking to:

Because I am the age that I am, it sounds a little pretentious. [...] I mean, I don't want to be presumptuous, but people of your age and younger generally do understand... if they're in a professional milieu of some kind, but... people in my age don't particularly understand it. And they also, I think, if I said to someone of my age who's kind of lively, you know, and had had their own career and maybe still having it... if I said to them 'I'm a social entrepreneur', they'd think you're a bit poncy. You know... you're a bit up yourself, they would say. But on the other hand, if I stood outside the charity called [name], and I'm the founder of it... 'Did you really start that?', then they might well say 'oh, that's really great!'... So, I ask you, do I want people to think that I'm poncy, or do I want people to think that I'm really great?... So, there you are. You know, I would like them to be interested in what I do, like anyone would be ... (Bill – international health organisation)

To sum up, this study has identified a high level of discomfort and sometimes reluctance of the participants to identify themselves as 'social entrepreneurs', particularly amongst 'Volunteer Activists' and some 'Rationalising Professionals'. Those who used the terminology, particularly 'High Aspirers' mostly did so as it helped them to market the venture or raise funds for it, but also pointed out that the usefulness of the term depended on the context in which it was used or the situation they were in. Their approach to using SE language therefore provided evidence for them using 'impression management' as social entrepreneurial tool to conform to the strategic interests of funders (Teasdale, 2010), as discussed in Chapter 3.

The last section has also shown the influence that having been brought up in a particular political or economic context can have on people's value systems and attitudes towards SE which in turn influence their motivations and (limited) self-identity as 'social entrepreneurs'. However, these societal influences are dynamic and the extent to which value priorities and conceptions change over time is also contingent on individual life experiences. Such triggers can lead to modified approaches to SE and result in social entrepreneurial activity shifting between types over time.

The influence of the participants' personal background and life course on their value system and self-identity as social entrepreneurs, and therefore on their SE motivations, will be discussed in more depth in Chapter 7. The following section will explore the consequences of the findings presented in this section for the question whether 50+ social entrepreneurs are missing or hidden.

6.5.3 Missing or Hidden?

The main reason given by the participants for not using the term was their perception of a lack of understanding regarding the meaning of SE among the general public. However, keeping in mind that over half of the interviewees had received an award from UnLtd (see Section 5.6), a charity that supports ‘social entrepreneurs’, relatively few (6/13) used the terminology. In contrast, AWs (7/13) were more likely than non-AWs (3/8) to either reject or feel uncomfortable using the term to refer to themselves and their SE activity.

The majority of participants either thought that using the language of SE was not particularly helpful as other people would not understand it, or they were not sure of the meaning themselves. For example, for some the concept of ‘social *entrepreneurship*’ meant that the project needed to have an entrepreneurial – which in their view implied individual profit seeking – aspect. Others thought that ‘*social* entrepreneurship’ meant that they were not allowed or did not need to generate a trading income through the project.

Some resisted using the term because of their understanding or conception of it which was not compatible with their mission and expectations of the project. Some also expressed concerns as to whether they ‘qualified’ to be a social entrepreneur or whether they could live up to the ‘expectations’ of being one, including some who had received an UnLtd award, thus being recognised as ‘social entrepreneurs’ by others in the process. This finding indicates how the social construction of social entrepreneurs as ‘heroes’ or an ‘elite’ may also discourage some ‘ordinary people’ from putting their ideas for social ventures into practice (Thompson, 2002; Humbert, 2009).

These findings confirm that the lack of a universally accepted definition, discussed in Chapter 3, proves problematic in practice as well as in theory. They also provide support for the legitimacy of Parkinson and Howorth’s (2008: 286) warning of the danger that the existing mismatch between different parties in how language is used may lead to “lack of understanding, conflict, misallocation of resources and loss to the sector”.

Furthermore, these insights point to the following implications regarding the questions, set out at the beginning of this chapter, around the apparent under-representation of older people in SE: 1.) The results suggest the existence of a large number of older people who are SE active, as defined in the study, but who do not use the label or language of SE and, in this sense, are ‘**hidden**’. 2.) The findings also suggest that there may be a significant number of individuals

with great skills, ideas and, hence, potential for SE, who are intimidated by idealistic presentations of social entrepreneurs, and therefore think that they do not meet the 'criteria', or who are unaware of the potential benefits of involvement in SE activity. These individuals are therefore '**missing**' from SE.

6.6 Conclusion

This chapter has contributed to understanding of OSEs by empirically exploring 'who they are', 'what they do', and 'how they do it', as well as their self-identity as social entrepreneurs. It has shown how participants' individual personal and professional backgrounds underpin different conceptions of and motivations for SE activity which, in turn, translated into specific operational approaches to social value creation.

The data suggest a spectrum of SE activity amongst OSEs with varied contributions, expectations and support needs. Three main types have been identified: 1.) 'Volunteer Activists'; 2.) 'Rationalising Professionals' and 3.) 'High Aspirers'. At one end of the spectrum, 'Volunteer Activists' focus on social entrepreneurial activities of small scale and local scope, mostly in the form of unincorporated initiatives and without trading income, and often as a form of self-help to address social issues they were affected by themselves. At the other end, 'High Aspirers' set up highly professional social ventures of medium to larger scale and, in half of the cases examined, international scope, aiming for the largest possible impact for their social needs.

The analysis challenges dominant perspectives on SE, while contributing to theory in a number of ways. As identified in Chapter 3, attempts at conceptualising SE activity have mostly centred around comparisons to 'mainstream' entrepreneurial activity, contributing to a prevalent image of the (social) entrepreneur as 'heroic individual'. However, this study provides support for other, more recent, studies that deconstruct this notion in four main ways.

First, almost half (10/21) of the participants were 'Volunteer Activists', the category least likely to be associated with the 'heroic entrepreneur' described in the entrepreneurship literature. Only four participants were 'High Aspirers', the category which most approximates to the high-flying 'social engineer' social entrepreneur described by Zahra *et al.* (2009).

Second, in line with other existing demographic information on social entrepreneurs generally, this study has identified OSEs as a diverse group in terms of gender and ethnicity. The fact that a key characteristic of 'volunteer' activists was that they mainly consisted of women from an ethnic minority background, whereas all 'High Aspirers' were white men, provides evidence for the dynamic interplay between race, class, gender and ageing, resulting in some being more enabled or constrained in their social entrepreneurial activities than others.

Third, the fact that almost one third of the participants of this study operated in teams, as well as the importance of networks for their SE activity, provides evidence for SE as a collective phenomenon rather than being dependent on the efforts of the high achieving individual social entrepreneur.

Fourth, an exploration of the language that participants used in relation to their SE activity further supported the need for a more diverse conception and presentation of (social) entrepreneurship, as suggested by Steyaert and Katz (2004). Only a few interviewees identified with the SE terminology and those who did so mainly treated it as 'jargon' to be used for marketing purposes or to raise funds for their initiative. Reasons given for not using the term included not being sure of its meaning, concerns about the 'expectations' associated with the term and participants' ability to live up to these, or that they saw the term as incompatible with their mission. In addition, some interviewees associated the term 'social entrepreneur' with 'somebody younger'.

The interviews therefore help to explain the apparent under-representation of this age group in SE. They provided evidence for the argument, developed in the literature review, that the presentation of (social) entrepreneurs as 'an elite' can contribute to discouraging individuals from identifying themselves as such, as well as becoming involved in SE. This realisation has led to the argument that OSEs might be 'hidden' as well as 'missing'.

In any case, the data supports the need to move away from the presentation of SE as elitist, heroic, white middle-class and 'for the young only', and to reconsider the image of what it means to be a 'social entrepreneur'. Furthermore, there is a need to redefine the notion of success and value in relation to contributions which are less market oriented and focused on very specific small-scale local and/or ethnic/cultural needs and enhancing the quality of life of individuals in these communities.

As set out at the beginning of this study, in the context of our ageing population and related questions regarding older people's involvement in economy and society, there is a need for

policy makers and support organisations to make sure that opportunities for older people are maximised and that social exclusion is minimised (Walker, 2005). There is a therefore a need for the government and support agencies to recognise the diversity of contributions of OSEs, as reflected in the spectrum of social entrepreneurial activity illustrated in the typology of social entrepreneurs, and to develop appropriate support mechanisms which respond to the range of different needs.

7. Embedded in the Life Course – The Development of Motivations for Social Venture Formation

7.1 Introduction

Motivations were identified as a vital factor in the (social) entrepreneurial opportunity development process in Chapters 2 and 3. Nevertheless, motivations remain an under-researched area in both social and ‘mainstream’ entrepreneurship (Carsrud and Brännback, 2011). Furthermore, existing literature tends to examine entrepreneurial motivations in isolation from other factors. Those studies that have taken the influence of individuals’ background and other, more, structural factors, on motivations into account still do not explain why individuals choose to become involved in SE at a particular time in their lives and why some opportunities are exploited and others not. While quantitative work on motivations has been undertaken by Jayawarna *et al.* (2013) in relation to ‘mainstream’ entrepreneurs and qualitative research by Shaw and Carter (2007) on social entrepreneurs, there have been no in-depth qualitative explorations of SE motivations from a life course perspective.

This chapter identifies the importance of the wider context in which motivations for SE activity are embedded by applying a life course approach to studying the SE process. By looking at OSEs, it will demonstrate that people’s motivations for becoming involved in SE cannot be seen as static or understood in isolation from other aspects of their past, present and plans for the future. In addition, it will be shown how motivations are interlinked with individuals’ conceptions and expectations of SE, as suggested in Chapter 6.

Whereas the life course approach has been used to study entrepreneurial learning and cognition (e.g. Mitchell *et al.*, 2002, 2004; Rae, 2005) and entrepreneurial career development (Gibb Dyer, 1994), its usefulness for researching the entrepreneurial process and motivations is currently under-recognised (Jayawarna *et al.*, 2013).

This chapter therefore contributes to existing knowledge on the SE process by integrating new and existing research and theory. The results shed light on the importance of the life course for a better understanding of the SE process, in particular for demonstrating how considerable lapses of time can separate opportunity recognition (or creation) from opportunity exploitation.

Based on the insights gained from the literature review and the gaps identified, this chapter addresses the following research questions:

How and why did 50+ social entrepreneurs become involved in SE?

What are the pathways into SE activity? What is the nature of the motivations driving their SE activity? What influences these motivations? Why did they choose SE over 'mainstream' entrepreneurship or volunteering?

How are their motivations related to their age/life stage?

Why did they get involved in SE at that particular time in their lives? What is the role of work/retirement decisions in the context of their SE activity?

How do motivations and life stages feed into the SE process?

What is the relationship between motivations, opportunity recognition and exploitation? What is the role of life stages in the SE process?

The next section will start by exploring pathways into SE, and will illustrate the influence of the individual background as well as previous experience in volunteering on participants' motivations. This will be followed by a section on participants' personal and social motivations for setting up their social ventures. Building on these insights, the third section will present a model of SE motivations and the SE process from a life course perspective. The last section will discuss how perceptions of risk influence motivations, and how risk taking behaviour is influenced by life stages.

7.2 Pathways into Social Entrepreneurship and the Role of the Life Course

The life course approach enables examination of the wider context of how and why participants became involved in SE activity. As the data showed, they had set up their social ventures at different stages of their lives for diverse reasons which were influenced by their individual backgrounds and life courses. Despite this diversity, important patterns were identified in relation to the roles of the personal and professional backgrounds, as well as volunteering experience in shaping motivations. The relevance of these three, sometimes overlapping, domains is illustrated in Table 7.1 and is discussed in detail below.

Table 7.1: Pathways into SE

Types	Name	Pathway into SE (and the role of experience in volunteering)	Current SE Activities	SE related to:	
				Personal Background	Professional Background
Volunteer Activists	Tom	Own experience of discrimination due to chosen lifestyle.	Documentary on travellers community		
	Audrey	Has been involved in volunteering for numerous related human rights projects. Decided to set up meeting place for people of the same cultural origin, to discuss problems and offer cultural activities.	African dance		
	Elizabeth	Got to topic through own experience of racial discrimination on several occasions. Has been volunteering for related projects since early adulthood.	Fighting racial discrimination		
	Phillip	Got involved gradually through volunteering over 20 years ago.	After school club/volunteering project		
	Agnes	Has yearlong experience in volunteering , helping people of all ages, also back in her country of origin.	African crafts and traditions		
	Steve	Through leading role in volunteering for a religious group which 'helped his life'.	Creative teaching/volunteering project		
	Patricia	Started volunteering while on maternity leave. Felt that area of activity was more enjoyable and meaningful and decided change in careers which led to area of work strongly linked to own ethnic/cultural background and current SE	Improving health of target group		
	Betty	Through work as social worker and trainer for the voluntary sector . Saw a lot of 'wasted youth' at work.	Social inclusion of target group		
	Lara	Recognised the need for this approach through experience in schools in day to day work - saw a need for change.	Creative teaching in disadvantaged areas		
	Victoria	Started volunteering after retiring in response to death of her husband. Had tried to set up her own 'mainstream' business during her core career, but failed as she was not interested in making a profit.	Work integration		
Rationalising Professionals	Andrea	Fell seriously ill when 50 and decided not to go back to her career job: "I wanted to do good, whatever that means". Came across need for social venture through volunteering project after recovering from her illness.	Recruitment service for target group		
	Catherine	Got interested in this type of work when volunteering as young adult. Used SE activity to complement her work in her core career and set up another social venture after retiring.	Social inclusion of target group/time bank		
	Lisa	Used to do voluntary work in related area before setting up social venture. Had been made redundant and realised that no support was available - set up own venture to fill the gap.	50+ Recruitment and training		
	Adam	Continued his work in own project after retiring from paid employment. Has also been volunteering in related field for over 20 years.	50+ Recruitment and training		
	Paul	Already developed interest in working with target group when studying Arts at school - and has been involved in related projects ever since. In addition, has yearlong experience in related and unrelated volunteering .	Inclusive arts project with particular target group		
	Peter	Had studied art therapy and had work experience with target group.	Inclusive arts project with particular target group		
	Tracey	Through family member who had done training in the area - inspired her to set up venture.	Tackling anti-social behaviour in the community		
High Aspirers	Jack	Volunteering experience since school. SE activity evolved from leading roles in volunteering after completing university.	Community cohesion through IT/media health		
	Robert	Through volunteering project after retiring from his main career.	Fairtrade		
	Bill	Got involved through Voluntary Service Overseas over 40 years ago. Set up his first charity when he was 29.	Improving health and social inclusion of target group		
	John	Long involvement as volunteer and experience as director of a charity. Developed interest in SE ten years ago. Likes that it is self-sustaining.	SE consulting/tackling poverty in deprived communities		

Almost all of the participants were ‘pulled’ into SE activity and, becoming involved because of their motivations to do so, rather than necessity. Only one interviewee had been ‘pushed’ into setting up the initiative at a time of unemployment. Lisa (‘Rationalising Professional’) had been made redundant and realised that she did not qualify for any support to find employment. She used this gap in service provision to set up her own organisation to provide support for people over 50 to find employment. However, she was also motivated by pull factors to some extent, as it was her choice to set up a social venture rather than a ‘mainstream’ business consultancy, showing that a categorisation by push/pull factors provides a very simplified view of motivations.

7.2.1 The Personal and Professional Background

In the majority of cases motivations to set up projects were rooted in the personal rather than the professional background of interviewees. The expertise and skills used for starting and running ventures were often related to participants’ professional backgrounds, or closely linked to transferable skills. The role of personal and professional background will now be discussed in more detail (see also Tables 7.1 and 7.2).

Table 7.2: Relationship between SE Activity and Personal/Professional Background

<i>Type</i>	<i>Volunteer Activist</i>	<i>Rationalising Professional</i>	<i>High Aspirer</i>
Relationship to the Social Need	Mostly personal - often based on direct experience of the issues involved	Mostly ‘objective’ – less directly affected and more informed by ‘professional/rationalising’ perspective	Not personally affected but often very personal/emotional relationship to the social need
Skills, Experience and Knowledge used for SE Activity	More likely to draw on <i>personal</i> knowledge, volunteering experience and skills associated with their cultural/ethnic heritage than on professional experience	Mostly drawing on professional experience or transferable skills	Drawing on professional background and experience and most likely to have previous experience of self-employment

Source: qualitative data

Relationship to the Social Need

In case of the ‘Volunteer Activists’, the social needs addressed tended to be very personal to the social entrepreneurs who had often had personal experience of the issues involved. Even if the SE activity was not directly related to the professional background, in most cases the participants had been able to use transferable skills from paid work or volunteering for running

their social ventures. Tom, for example, used his professional background in film making to produce a documentary to tackle discrimination against the cultural group to which he belonged.

The 'Rationalising Professionals' had a more objective relationship to the social needs they were addressing. They had mostly identified the gap through observation of problems in the particular community and/or through their (previous) employment. The nature of the work was either directly related to their professional background, or they had applied transferable skills from their work to set up and run the venture. For example, Tracey ('Rationalising Professional') became concerned about the media reports of several incidents of antisocial behaviour in her local area within a short period of time. One of these incidents which had happened on a bus that her children used to take prompted the idea of setting up a social venture to tackle antisocial behaviour in the community.

The social issues tackled by the 'High Aspirers', on the other hand, did not appear to have any obvious relationship to them personally. Instead, the ventures were strongly linked to the participants' professional background and they tended to be very proficient in running the social ventures as sustainable organisations. For instance, Bill ('High Aspirer') set up a mental health organisation in the developing world after yearlong experience with mental health users:

I had become aware over many years of the problem that mentally ill people have, and had become also aware that this space was very little inhabited in the developing world by professional agencies, so it was essentially an entrepreneurial market place which most people saw as a disaster. I saw it as an opportunity to start a brand new charity, as a brand new brand and name, and, as part of the model, a brand new way of working. (Bill – 'High Aspirer')

However, as a closer examination revealed, in three of the four cases the motivations to set up this particular social venture were rooted in their childhood or youth. All three had either been born or spent their childhood/youth in the developing world. The experience of having witnessed inequalities and poverty there had provided their main social motivation to 'give back' through their SE activity. Robert, who was running a fair-trade venture, explained his motivation as follows:

A phrase which sounds a bit clichéd but is relevant is the phrase 'giving back'. [It is relevant] at two levels: one, giving back into the developing world which I have always had a very strong connection with and I think that comes from my African childhood and also an interest in the developing world issues, but also giving back in a financial

sense because I have been very fortunate and I am well off and this is part of giving stuff back. (Robert – ‘High Aspirer’)

In 12 cases, the SE activity tackled cultural/ethnic or local community issues (see Table 6.1 in Chapter 6). However, eight out of these were ‘Volunteer Activists’ and the ventures were more likely to address social needs in their own cultural/ethnic and/or local community than was the case in the other types. The examples provided in Box 7.1 illustrate the strong relationship of the SE activity with participants’ cultural/ethnic background. The remaining four cases were either focused on the local community where the social entrepreneur lived or on improving conditions in disadvantaged communities to which the social entrepreneurs did not belong but which they had a personal relationship to. The data therefore shows how initiatives were strongly embedded within particular localities (i.e. in a geographical sense) (Shaw and Carter, 2007) and/or cultural communities (Pankay, 2002).

Box 7.1: The Role of the Ethnic/Cultural Background

Elizabeth (‘Volunteer Activist’, Black-Caribbean) described herself as an ‘activist’ fighting for the rights of her people. She was running a portfolio of activities which were all motivated by her personal experience as a victim of racial discrimination and abuse. She had been actively engaged in related initiatives for many years, at work and privately. Elizabeth was strongly devoted to her mission and declared: *“I will stay an activist till the day I die”*.

Audrey (‘Volunteer Activist’, Black-African) was particularly motivated by the ongoing conflict and specific problems in her cultural community, about which she felt strongly. She left her country of origin at a time of war and was devastated when she saw the difficulties experienced by her ethnic/cultural community in East London. As she noted, *“there was a lot of exclusion [and] people were very isolated... people were worried about what would happen at home because war was continuing in that region”*. She decided to provide a place for people to get together to discuss their problems and set up cultural community activities, including traditional dances of her homeland.

Tom’s (‘Volunteer Activist’, Asian-British) project was aimed at fighting prejudices which he had directly experienced related to his lifestyle as traveller:

It’s really because of injustice and the fact that there are loads of people out there, families, who are being victimised, being bullied about, pushed about and it’s all because of a false image that’s being portrayed to them. [...] The reason why I’m doing this is to redress the balance and also because I actually live like this now; it’s threatening my health, it’s threatening my stability, so I have to do something about it. I’m trying to show people that it’s a perfectly reasonable lifestyle, and that society should accept rather than reject gipsies and new travellers.

Patricia (‘Volunteer Activist’, Black-African) was running an organisation seeking to improve the health, social and economic position of BME, asylum seekers, migrants and vulnerable communities, with a focus on tackling and redressing the use of harmful/traditional practices. The social venture was based in her home locality where affected communities are strongly represented and her own cultural background was seen as a crucial requirement for being able to carry out this activity.

Skills, Experience and Knowledge used for SE Activity

In the majority of cases, participants had drawn on previously acquired *professional* experience and skills in setting up and running their social ventures. However, the ability to apply skills and other advantages gained from the professional background varied between types and was contingent on the particular skills sets involved (see Box 7.2). This in turn resulted in the different challenges, barriers and support needs of OSEs as discussed in Chapter 6.

Box 7.2: The Role of the Professional Background

Lara ('Volunteer Activist') had been very frustrated in her job as a school teacher, perceiving the professional environment to be overly rigid and leaving insufficient room for creativity:

I've always been a teacher, and I saw that the curriculum was really very very rigid, very prescriptive. And the children didn't like it, [this teaching approach] doesn't speak to the children.

Consequently, she left this employment and set up a social enterprise in order to pursue a more creative and enjoyable approach which she felt was vital for underpinning a more effective learning experience for young children.

Catherine ('Rationalising Professional') set up her first social venture as an extension of the NHS service she had been involved with in her career job. As she explains, it "*allowed me to do the things I couldn't do in my job... and things the health service wasn't very good at...*".

Bill ('High Aspirer'), who had set up a internationally operating mental health organisation, had been self-employed for over 40 years and started 9 social ventures over his life, using his experience trying to create a 'better ' one every time:

I definitely have the experience, I mean... of charities of a certain size... and I know what it's like to run somebody else's ship. In fact I did it to get experience... I have learned some of the sort of characteristic things which hopefully make it a better organisation.

Six participants had been self-employed before setting up their social initiative (three 'High Aspirers', two 'Rationalising Professionals' and one 'Volunteer Activist') and were therefore more likely to possess a range of competencies and the 'jack of all trades' flexible skills (Curran and Blackburn, 2001) as discussed in the context of older entrepreneurship in Chapter 4. For instance, John ('High Aspirer') provided virtually the same service through his social venture as that which he had previously provided through his for profit business, albeit to a different clientele. In addition, six had had leading roles in the charity sector (see 7.2.2).

In three 'Volunteer Activist' cases, participants drew in particular on *personal* knowledge and skills associated with their cultural/ethnic heritage. For example, Agnes ('Volunteer Activist') had set up a social venture in which she used her talents in traditional African crafts to provide a meeting place for women of the same ethnic background as a way of combating social exclusion.

To sum up, in most cases both personal and the professional background had shaped participants' SE activities in distinctive ways, although typically one of the two factors had played the determining role. However, one key influence on pathways into SE identified shared by most cases was previous experience of volunteering, an issue to be further examined in the next section.

7.2.2 The Role of Experience in Volunteering

This study provides evidence that people (over 50) are more likely to become involved in SE activity if they have previous experience of volunteering. All participants had engaged in voluntary work at some stage in their lives before starting their social venture, a finding which is congruent with previous research which found that people tend to engage with volunteering in early rather than in later life (Erlinghagen and Hank, 2006). Although a few of the participants had relatively limited experience in volunteering, others reported long standing involvement in such activity from an early age (e.g. since school), and that this experience had been influential to varying degrees on their more recent social venture. Moreover, of the 21 interview candidates, six had had leading roles in the voluntary sector before starting their social ventures, three of them belonging to the 'High Aspirers' group, one to the 'Rationalising Professionals' and two 'Volunteer Activists'. As Table 7.1 illustrates, for 17 participants volunteering had provided a route into SE and most of them were still drawing on knowledge and skills acquired during their volunteering experience. These findings therefore support previous research by Shaw and Carter (2007) which found that one third of the social entrepreneurs studied had prior third sector experience.

Examples of how voluntary activity, as with SE activity, was embedded in the life course are provided in Box 7.3 – this topic will be discussed in more detail in subsequent sections.

Box 7.3: Volunteering as Route into SE

Victoria ('Volunteer Activist'), who was running a work integration project, took early retirement at 50, largely as a reaction to the death of her husband. She had not been involved in volunteering until then, but became increasingly involved in the sector and is now running her social venture full-time.

Andrea ('Rationalising Professional' – recruitment service for a disadvantaged group of women) decided not to return to her high flying career job after returning from a serious illness, explaining "I wanted to do good, whatever that means". She became involved in a volunteering project through which she identified the need for her social venture.

Jack ('High Aspirer' – improving social cohesion in disadvantaged neighbourhoods) had been working in the third sector for over 40 years and his SE venture had evolved from voluntary activity undertaken as a young adult. Rather than looking for a job related to his field of university study, his original intention after graduating, he decided to do work for Community Service Volunteers. As a result of his volunteering experience, he became intensively involved in the cooperatives movement and built up a career as project manager for a wide range of related initiatives. As Jack noted, *"there's no job I've ever done that didn't come out of my voluntary activities, because of the work that I did... going back to the very start"*.

Robert ('High Aspirer' – fairtrade) had not done any volunteering before retirement. He had been looking for a retirement project, and became involved in a voluntary study that ended up inspiring him to set up his social venture in a related field.

To sum up, this section has demonstrated the influence of the past as well as current circumstances on participants' SE activities. In most cases, motivations to set up social ventures were found to be rooted in personal background and experience, and with the SE activity either strongly related to professional background or to individuals' transferable skills. There were, however, differences between types in the extent to which this was reflected in the nature of the SE activity.

In addition, it has been revealed that in the majority of cases, previous experience in volunteering had provided the pathway into SE. The question as to why participants took the next step to set up their own ventures, rather than continuing to volunteer in an existing organisation, will now be explored in detail. Furthermore, the next section will demonstrate the importance of adopting a life course perspective in order to better understand when and why motivations are translated into actual ventures.

7.3 Motivations of 50+ Social Entrepreneurs

This section examines why participants chose to become involved in SE and why they set up their social ventures at the particular moment in their lives. As pointed out in Chapter 3, there

currently is a dearth of empirical research which examines SE motivations in detail, and a significant shortcoming of much of the existing research is the limited attention given to structural and contextual factors. Those studies that do consider the influence of individuals' background and structural factors on motivations still do not explain why some opportunities are exploited and others not.

Given the exploratory nature of this study, it was not an original aim to rigorously examine the validity of the current understanding of entrepreneurial motivations (as discussed in the literature review). However, following cross-case analysis, several broader motivational patterns (identified through key words which could be combined in clusters) emerged from responses to the question on personal and social motivations for starting the social venture (see Table 7.3), which will be discussed in detail below. The in-depth interviews therefore provide important insights into how motivations are embedded in their wider context, although future research will need to test the validity and generalisability of these patterns.

The data reveals that interviewees often had multiple interrelated and overlapping motivations. They included a combination of social and personal achievement motives, both altruistic and more egoistic factors (Blank, 2012), but that these were also significantly influenced by situational and structural factors over the life course, as will be further elaborated below.

Table 7.3: Motivations of 50+ Social Entrepreneurs

<i>Type</i>	<i>Volunteer Activist</i>	<i>Rationalising Professional</i>	<i>High Aspirer</i>	<i>Total</i>
Number of Cases (n=21)	10	7	4	21
Social Need	10	7	4	21
Self-fulfilment	3	4	4	11
Independence	4	4	4	12
QoL	9	6	4	19

Source: qualitative data

As discussed in Chapter 4, life course structures are closely related to work life transitions which have tended to become more complex and individualised in recent years (Marshall and Taylor, 2005). This phenomenon is reflected in participants' (plans for) activities in retirement

and the role that they attribute to their SE activity in their lives. Whereas some had taken early retirement, others were not planning or able to retire for the foreseeable future. In any case, as will be shown, retirement provides an important transition phase which strongly influences older people's SE motivations.

Furthermore, as pointed out in Chapter 6, motivations are also reflected in expectations of and contributions to SE activity. As will be shown, there were differences within the motivational themes, which showed some interesting clusters by type. It will be argued that these fine nuances within motivations provide further insights into the questions of whether OSEs use SE as an alternative to or 'middle way' between volunteering and 'mainstream' entrepreneurship.

7.3.1 The Social Need and OSEs' Relation to this

All interviewees pointed out that the main focus of their ventures was to address social need, providing support for previous research suggesting that a strong emphasis on values associated with social justice, equality and helpfulness (Stephan *et al.*, 2012) or altruism (Germak and Robinson, 2012) provides the most prevalent characteristic of participants' motivations for becoming involved in SE. As pointed out in Chapter 3, this key motivation has been identified as the main difference, separating social entrepreneurs from 'mainstream' entrepreneurs (Shaw and Carter, 2007), but has also been described in the context of volunteering (ONS, 2010b; Smith and Gay, 2005). In relation to SE, it is directly linked to the main objective to create 'social value' (Dees *et al.* 2001; Seelos and Mair, 2005; Volkmann *et al.*, 2012).

As discussed in Chapter 6, the data revealed differences in how participants sought to address social need, which are reflected in the presented typology (see Appendix C). Whereas 'Volunteer Activists' are less likely to focus on monetary outcomes, 'High Aspirers' view their emphasis on financial value creation as crucial for achieving the greatest possible social impact.

When asked why they decided to set up their own social venture rather than joining an existing organisation as a volunteer, the main reason given was that the initiative did not exist in this form and that they had identified the need for it (see Box 7.4). Furthermore, in most cases the issues tackled were highly specific to the participant (see Table 7.1), and intimately intertwined with their personal life courses.

Box 7.4: Motivations for Social Venture Creation – the Social Need

Although participants' motivations differed widely, they had all identified a gap in the form of a social need. For instance, Elizabeth's ('Volunteer Activist') initiative aimed at raising awareness of racial discrimination experienced by her ethnic group:

It's an idea I had for years and years and which bothered me about some of the things that I experienced, and I wanted it to be told... I read quite a lot of stories that people wrote and most, when they got the funding, were restricting it to what they could write and what they couldn't. So, to me, I found it very biased, because it wasn't telling the true story, it was too pretty pretty... and what I wanted to do was getting a bunch of people who prepared, not only to tell their story, but to be identified which means that they had to give a picture [photograph].

Adam ('Rationalising Professional') set up a social enterprise to help professionals over 50 to find employment that matched their skills and experience, as he felt that they often ended up in jobs for which they were overqualified:

I wouldn't be critical of B&Q today, because B&Q obviously employ a lot of older people, but there are an awful lot of older people who have got degrees and they have great abilities to do work... they could be the manger in B&Q, but they'll never be the manager in B&Q, they'll be the nice, friendly old man who'll help you when you're struggling to buy a new kitchen or something. So it's about respecting the fact that older people [...] can be valuable contributors to society. So, that was my sort of motivation, if you like.

Andrea ('Rationalising Professional') initiated her venture to help a disadvantaged and socially excluded group of women find employment:

I was angry, frankly. I was angry, because nobody else seemed to be doing it. And I've been doing it for three years now, and I still haven't found anybody else who's doing it really. [...] I've always felt, I think, quite strongly about women's issues without ever really having done anything about it in my life.

Whereas all interviewees cared about the social problem they sought to address, and were motivated by the need for social achievement (Valéau, 2010), the reasons given for their interests in the particular topic varied according to their relationship with and/or their relative 'closeness to the problem' (London, 2010). As discussed in the context of the role of the individual background in the previous section, this relationship ranged from having no obvious connection to the social need addressed, to being personally affected by it, as is reflected in the typology to some extent. The majority of 'Rationalising Professionals' had encountered the social need through their work and were motivated to address it by their social, altruistic or self-transcendence values (Germak and Robinson, 2012; Schwartz, 1992, 2007; Stephan *et al.*, 2012), the meaningfulness of their work. Catherine ('Rationalising Professional'), who had set up a time bank where members could exchange skills and time, appears to provide an exception to this pattern. She pointed out, *"I don't believe very much in altruism... I think*

you've got to think about the people who volunteer getting something back themselves". Her case leads directly to the personal or egoistic motivational factors, or benefits to social entrepreneurs, which will now be examined.

7.3.2 Self-fulfilment and Independence

Another key pattern identified was related to the two motivational themes of achieving self-fulfilment and independence, which have been identified to be the two main reasons for individuals to become involved in entrepreneurship (European Commission, 2007). They have been combined in this section, as they proved to be inseparable in the majority (10/12) of cases.

Self-fulfilment was discussed in the context of Maslow's (1943) hierarchy of needs in Chapter 3, as well as the 'need for achievement' motive and, relatedly, intrinsic motivation which refers to interest and enjoyment in an activity because of its 'self-fulfilling nature' (McClelland *et al.*, 1989; Lai, 2011). However, the interviews revealed that participants had very different conceptions of how self-fulfilment may be reached, and sought different forms and levels of achievement. As will be demonstrated, these different expectations were broadly reflected in the typology.

SE activity fulfilled participants' wish for independence insofar as it allowed them to shape the venture according to their personal preferences and passions. As Catherine ('Rationalising Professional'), who had set up two social ventures in unrelated areas, explained, *"I like being on the creative side, I like innovating... probably I'm a bit awkward and wouldn't want to join anybody else's [venture]"*. The wish for independence was expressed across types, but more frequently amongst 'Rationalising Professionals' and 'High Aspirers' than 'Volunteer Activists' (see Table 7.2). Three of the four 'High Aspirers' had been self-employed for most of their professional careers; in these cases, independence was therefore a status to be maintained, rather than a goal to be reached.

However, particularly for participants whose area of SE activity was strongly related to their previous employment (3 'Volunteer Activists' and 3 'Rationalising Professionals'), setting up their own venture, and thereby becoming independent from the constraints they associated with working for somebody else, often entailed finally achieving self-fulfilment. For example, in Lara's ('Volunteer Activist') case, her SE activity was an extension to her professional career;

her social venture had naturally grown out of her profession. She had trained as a teacher, and had always worked as a teacher, and her SE venture had enabled her to continue her profession outside the constraints of school curricula. In her case, it was dissatisfaction and frustration with her job that made her leave and set up her own venture:

I tell you, being a teacher, because I'm very creative, I couldn't [work] in the way they were telling me. Because, I wanted to do it [my] way, and the children were responding very well. So, I had to leave in order to do what I believe in... [...] maybe I'm mad but this is what I wanted to do. So I said 'ok, at the end of the month I don't have my salary, but I have my mind back' [laughing]. (Lara – 'Volunteer Activist')

Peter ('Rationalising Professional'), who was running a social venture in the field of inclusive arts, had never been employed in his life. As he explained, SE suited his approach to life and provides self-fulfilment through independence:

I made a conscious decision at a very early age that I wasn't interested in essentially material gain, but I was more interested in creative inspiration. My main personal motivations are essentially the same as my ascetic social motivations, which are that I am a humanist by nature, and that I am playful instinctively and intuitively, and I am free. (Peter – 'Rationalising Professional')

However, the interviews also revealed the influence of participants' life stage on the decision to put their social venture idea into practice, and thereby seek self-fulfilment. As the following case demonstrates, life course events can change individuals' perceptions of the type of success that leads to personal satisfaction and fulfilment. Andrea ('Rationalising Professional') had abandoned a high-flying career after falling very ill at the age of 50. After having recovered, she decided to devote her life to something more 'meaningful' rather than returning to her job. As a complete change of career, she set up a social enterprise to provide support for a disadvantaged group of women and was running the organisation full-time. The area of activity was not related to her former profession; she realised the need for the initiative through conversations with affected women when doing voluntary work after recovering from her illness. When asked about the main personal motivation for getting involved in this project, she said:

I think I felt lucky to be alive, [...] I think as you get older, you kind of think 'oh wow, I don't have that much time left'; 'what have I achieved, what have I done?'; 'have I actually achieved anything?' Quite frankly, you get to the point where you think 'what does it actually matter whether I did somebody's annual report?' or 'what does it matter that we brought that website on day?' You know, it's... so meaningless. So, I think I just wanted something that was a little more meaningful. (Andrea – 'Rationalising Professional')

In addition, Andrea's example illustrates that experiences such as pivotal moments can also lead to changes in value priorities in later life. Her case therefore provides support for the life course perspective which views value orientations as dynamic and being influenced by changing cultural and social environments throughout life (Lesthaeghe and Moors, 2002), whereas the approach used in motivations research in entrepreneurship treats them as becoming stable in early adulthood (Bardi *et al.*, 2009). Her example also challenges prevalent notions of success.

The following two cases provide further examples for new life stages triggering new activities of a more self-fulfilling nature. John ('High Aspirer'), who had set up a social enterprise consultancy after his children had become financially independent, wanted to help the social enterprise sector develop before his retirement, so he called it "*a bit of a last gasp*". Robert ('High Aspirer'), who was running a fair-trade organisation, was looking for a retirement project that would allow him to "*give back*" to his country of origin in the developing world.

However, 'High Aspirers' were typically seeking a challenge and reaching self-fulfilment also meant achieving the greatest possible impact for their social causes. For instance, as discussed in the context of scale in Chapter 6, Bill's internationally operating mental health organisation had gone to scale already and, at the time of the interview, was anticipating further growth. Another example of a 'High Aspirer' aiming for high impact through is venture is provided by Robert:

I had spent a lot of my professional life teaching and consulting in the whole area of innovation and change management, mostly in the context of fairly large businesses and international organisations. [...] It was sort of a personal mission I suppose to find out whether I could actually do it for real. And at another level it was also about saying could I actually start up a business, particularly a business that was very high risk – could I get it off the ground, could I make it happen? (Robert – 'High Aspirer')

Most retired interviewees (5/6) had used entry into retirement as an opportunity to become involved in new, more enjoyable and fulfilling roles (Scase, 1999). This is particularly demonstrated by the cases of Adam and Catherine (both 'Rationalising Professionals') presented in Boxes 7.5 and 7.6 (see Section 7.3.3), who perceived the opportunity to run their own venture in their new retirement life stage as liberating and enabling.

In summary, the wish for self-fulfilment provided a key motivation for participants to become involved in SE and was often associated with greater independence. However, the ways in which personal fulfilment was sought varied between interviewees and also broadly between the three types. In any case, both self-fulfilment and independence are shown to be closely

related to factors which improve individuals' quality of life (QoL), which have been identified as another important motivation in this study and will be discussed in the following section.

7.3.3 Quality of Life

As pointed out in Chapter 6, this study provides limited evidence⁵¹ that OSEs are more likely to address the issues of an ageing society (such as e.g. care needs, work/retirement transitions, social exclusion) through their ventures than their younger counterparts. However, as the evidence on motivations discussed below shows, the SE activity of people over 50 helps address this issue by improving their own QoL. Once again, such contributions have to be seen in the context of participants' life course and retirement transitions.

Most (19) of the participants mentioned being motivated by factors which are associated with the concept of QoL in old age as introduced in Chapter 4 (Grewal *et al.*, 2004; Bowling, 2005). There were, however, important differences in QoL motivations between types (see Table 7.4).

Table 7.4: Motivations related to Quality of Life

<i>Type</i>	<i>Volunteer Activist</i>	<i>Rationalising Professional</i>	<i>High Aspirer</i>	<i>Total</i>
Number of Cases (n=21)	9	6	4	19
Tackling social exclusion and loneliness	5	2	-	7
Having a role	3	1	-	6
Having status	1	4	4	6
Personal Development	2	1	3	6
Retirement, Downshifting/ Lifestyle	5	3	2	10

Source: qualitative data

These themes will now be discussed in detail, and it will be shown that QoL related motivations are nuanced within and between themes. These variations are due to the fact that participants had different perceptions of what constitutes a good QoL, according to their individual life experiences and circumstances.

⁵¹ Although older people were the third most popular target group amongst AWs over 50 who participated in UnLtd's Annual Survey 2012, it was argued that this finding may be due to UnLtd's tailored programmes with an ageing focus (see Section 6.3.1).

Tackling Social Exclusion and Loneliness

Table 7.4 shows that ‘Volunteer Activists’ were most likely to be motivated by the aim of improving their social and physical well-being through tackling social exclusion and discrimination. None of the ‘High Aspirers’ were motivated by this factor. As Tom (‘Volunteer Activist’ – see also Box 7.1), who was living as a traveller, pointed out, his experience of discrimination due to his lifestyle was *“threatening his health and stability”*. In two other ‘Volunteer Activist’ cases, participants were motivated to address social exclusion and discrimination of people of their own cultural/ethnic group, which they had experienced themselves on numerous occasions.

Furthermore, in two cases (one ‘Volunteer Activist’ and one ‘Rationalising Professional’), interviewees were using SE to overcome social exclusion as a side effect of unemployment. As Lisa (‘Rationalising Professional’), who had set up her social venture after having been made redundant, explained, *“you’re sidelined when you’re unemployed and it damages your self-confidence”*.

Another theme which emerged from the data is related to research on volunteering discussed in Chapter 4, according to which older people use volunteering to overcome social isolation and loneliness, and as a way of gaining new and local social contact (Wardell *et al.*, 2000). This has been shown to be particularly helpful when a partner dies or children move away (Social Exclusion Unit, 2006). Two ‘Volunteer Activist’, who were both in their 70s had been affected in this way. One of them had no living relatives in the UK. The other was widowed and her children and grandchildren lived far away, explaining, *“you need something in your life; it’s just what I do. I enjoy it and [...] I’m content with my life”* (Victoria – ‘Volunteer Activist’).

Having a Role and Recognised Status

Activity (or role) theory, discussed in the context of QoL in Chapter 4, is another motivation which is closely related, if not overlapping, with the aim to tackle exclusion and loneliness to some extent and which turned out to be of relevance for this study. Activity theory has been applied in relation to occupation and retirement (Teuscher, 2003), and holds that sustaining social roles, obligations and activities that are important to people improve feelings of well-being in older age (Havighurst and Albrecht, 1953; Lemon *et al.*, 1972). The following quote provides an example:

I'd taken early retirement from the health service, so I had a health service pension, and I thought I wanted to do something... I hadn't really thought about doing any [personal] development before, as you might call it. Yeah, it's something I wanted to do to make my life more interesting. And the [time bank] gave me something to do that I thought was worthwhile, and also I met people in my local community because, when you're not working all day and the children don't go to school anymore, you don't tend to meet people that much... (Catherine – 'Rationalising Professional')

However, in some cases the participants wanted more than merely maintaining a role. Those interviewees who had had busy working lives and been in senior roles particularly felt the need for continuity of their status in retirement:

Maybe, since I'm retired as well, I want some kind of status. I quite like being chair of something [laughs], cause you do have status in work... (Catherine – 'Rationalising Professional')

Whereas having a role can also be achieved through voluntary activity, status is more closely related to entrepreneurship (Begley and Tan, 2001; Van Praag, 2009). As Table 7.4 shows, whereas the majority of 'Volunteer Activists' were satisfied with the role gained from their SE activity, the 'Rationalising Professionals' and 'High Aspirers' were more likely to seek status through wider recognition. For example, Bill ('High Aspirer' - international mental health organisation) pointed out that he would like people to appreciate and be impressed by his achievements:

If I stood outside my [social venture], and I'm the founder of it... 'Did you really start that?', then [people] might well say 'oh, that's really great!'... So, I ask you, do I want people to think that I'm poncy, or do I want people to think that I'm really great?... So, there you are. You know, I would like them to be interested in what I do, like anyone would be ... (Bill – 'High Aspirer')

These achievement needs are also reflected in the nature of SE activity, for instance, with 'High Aspirers' striving to achieve larger scale social impacts than the other two types.

Personal Development

One third (7/21) of the participants saw their SE activity as providing opportunities for ongoing learning and development that helped them to keep their mind active, a factor which has been shown to contribute to older people's sense of well-being, and therefore improving their QoL (Smith and Gay, 2005). This motivation was most common amongst 'High Aspirers', but was also mentioned by the other two types (see Table 7.4). Catherine ('Rationalising Professional' – time bank), for instance, talked about her time bank offering opportunities for personal development in retirement (see previous page). Elizabeth ('Volunteer Activist' – addressing racial discrimination) had completed her Master's degree in web-design at 70. At the time of the interview she was still active as a school governor, a member of various committees, and writing for newspapers. Another example is provided by Betty, who was running a social venture closely related to her previous job as youth worker:

I'm 63, so a lot of people are thinking of retiring, aren't they? For me [this time of my life] is my self-development. I've been learning all the time. (Betty – 'Volunteer Activist')

Two participants were engaged in PhDs on topics related to their SE activity (one 'Rationalising Professional' and one 'High Aspirer'). Furthermore, two 'High Aspirers' pointed out that their SE activity helped them to keep up to date with new technologies. For example, Jack ('High Aspirer'), who was running an IT related social venture, explained: *"I've always been totally selfish about getting my skills better and enjoying myself. I can still do most things... technologically I'm still probably more advanced than most other people".*

Retirement, Downshifting and Lifestyle Change

According to continuity theory, there is a need for individuals to make adjustments to ensure continuity between past and present in order to maintain their psychological well-being (Atchley, 1989, 1999). In this context, it was suggested in Chapter 4 that SE could provide an alternative to the traditional 'cliff edge' approach to retirement by providing a form of transition to the next life stage. As table 7.5 shows, almost half (10/21) of the interviewees had realised this opportunity, half of these also being 'Volunteer Activists'. Six participants were retired and using their social venture to stay active or maintain a role or sense of status and, thereby, often as an alternative to retirement. Four interviewees were using their SE activity as

a bridge or transition to retirement. As will be shown, their motivations for this varied according to personal circumstances. However, in both groups, downshifting played a role. As discussed in Chapter 4, downshifting refers to a voluntary choice by individuals to change aspects of their lives in order to improve their QoL.

Table 7.5: Role of SE in the Context of Retirement Decisions and Downshifting

<i>Type</i>	<i>Volunteer Activist</i>	<i>Rationalising Professional</i>	<i>High Aspirer</i>	<i>Total</i>
Number of Cases (n=21)	10	7	4	21
SE Related to Retirement	5	3	2	10
Transition	2	1	1	4
Alternative	3	2	1	6
Downshifting/ Lifestyle Change	3	3	1	7

Source: qualitative data

The most important theme associated with downshifting emerging from the data was that all seven participants saw SE as offering opportunities for more personal fulfilment and/or independence, discussed as a key motivation above. Six participants could be said to have downshifted to pursue a less materialistic lifestyle. This finding is compatible with a focus on social objectives rather than materialistic gain, as discussed at the beginning of this section. John described his move from running his own business to taking over the directorship of a charity as follows:

It was a pay cut of about 50% from what I was earning in my business. And I felt that, you know, my children didn't need me to be paying all the bills. I didn't need so much money. I mean, I'm living on very little money now, to be the sort of old hippie student.
(John – 'High Aspirer')

Similarly, Catherine, who had set up a time bank as a retirement project, explained in this context:

I had enough of the health service pension to live on, and now I've got the state pension as well; I can do these things, I don't have to make money... and I agree with Layard's⁵² findings ten years ago that beyond a certain point of income it doesn't matter how much you've got, it doesn't contribute to your happiness, and that kind of

⁵² Layard, R. 2003, 'Towards a happier society', *New Statesman*, 24 February. RL 362. Available at: <http://cep.lse.ac.uk/layard/RL362.pdf>. [Accessed on 2 May 2013].

thing, and that the more democratic the country you live in, the happier people are [laughs]... He's the happiness tsar now, Layard... So I think where economics meets social science, it's a very interesting place to be [laughs]. (Catherine – 'Rationalising Professional')

Furthermore, as discussed in Chapter 4, it has become increasingly common for individuals to simultaneously pursue education, work and leisure activities, rather than being limited to just one at a time (Bengtson *et al.*, 2005). Similarly, this study shows how participants' involvement in part-time social entrepreneurial activity conferred the necessary flexibility to fit in other commitments, and sometimes to devote more time to leisure activities or education. For instance, both Adam ('Rationalising Professional' – 50+ recruitment agency) and John ('High Aspirer' – social enterprise consultancy) were able to run their flexible SE activities alongside their for-profit businesses. Furthermore, Adam was able to go on prolonged holidays on a regular basis (see Box 7.5) and John had returned to university study. However, it also has to be pointed out that, in the majority of 'High Aspirer' cases, the SE activity involved working long hours as commonly experienced in self-employment contexts. Nevertheless, rather than perceiving this as a burden, they enjoyed the challenge of combining their SE activities within busy lifestyles.

To sum up, the above discussion has shown that participants' SE activity was driven by multiple motivations which were often interrelated and overlapping, involving a combination of altruistic and egoistic factors (Blank, 2012). Table 7.6 provides an overview of the broad motivational patterns and differences across the three main types identified.

Table 7.6: The Roles of Self-fulfilment, Independence and QoL

<i>Type</i>	<i>Volunteer Activist</i>	<i>Rationalising Professional</i>	<i>High Aspirer</i>
Self-Fulfilment	Achieved through independence and addressing problems very personal to them	Using their professional skills and experience to do something 'more meaningful' which benefits society	Achieving the greatest possible social impact
Independence	Aim to be achieved	Aim to be achieved	Status to be maintained
Quality of Life	Achieved through having a role; often tackling own social exclusion and loneliness	Maintaining status whilst achieving independence and less pressurised lifestyle/downshifting	Maintaining status and continuous personal development; enjoy the challenges of busy lifestyle

Source: qualitative data

It has been shown that the key driving force for all participants was their sense of social justice (or emphasis on self-transcendence values) in combination with the influence of their individual backgrounds and experiences. These motives therefore cannot be fully understood without reference to the life course context (as was illustrated in Table 7.2). The ways in which OSEs' motivations are shaped by their age and life stage was illustrated through the influence of the retirement life stage and transition phase in their decisions to become involved in SE.

In addition, the case studies provided in Boxes 7.5 and 7.6 illustrate the combination of benefits that participants gained through SE as an alternative to retirement, and exemplify how the adopted life course perspective revealed the development of motivations over time and the role of life stages for their exploitation. The analysis also demonstrates the importance of the new retirement life stage in providing the opportunity to set up the social venture, and how motivations were related to expectations that SE could provide personal fulfillment, giving them more independence and allowing downshifting, and thereby improving their QoL.

Box 7.5: (Multiple) SE Motivations and Improved QoL in the Retirement Life Stage - I

Adam (64, 'Rationalising Professional')

Adam took early retirement in order to set up a social venture that helps professionals over 50 to find employment. He used his SE activity to downshift, aiming to achieve a better work-life balance, independence and also self-fulfilment. After 25 years of working in a job that his father had chosen for him when he was 18 years old, Adam decided to resign and start a career in an area that he was personally interested in:

It took me 25 years to realise I didn't particularly want to be a civil servant, but it was about the security, but it's also about achieving and doing what you wanted to do, and therefore I started when I was in my 40s to do what I wanted to do. My children were not grown up but growing up, so therefore I saw this as an opportunity for me to develop the career that I would like to have had rather than the career that was sort of chosen for me. If you've got dreams, then why can't they be fulfilled?

However, despite a sharp break in career in his 40s, Adam did not become involved in SE for almost another 20 years. He studied community education and human rights at university and worked for an organisation which supports older people for 15 years. Aged 61, he *finally* set up his own social venture in an area of activity closely related to his latest employment:

Everybody assumed I was retiring [...]. And really, I wanted to do something different. [...] I was retiring from full-time work, but what I wanted to do was, in the first instance, to travel, but I also wanted to be able to be my own boss, which really I had never been throughout my whole career... but I also wanted to be able to work as and when I wanted really. So, therefore, as far as I was concerned, it was opening up a new chapter. (Adam – 'Rationalising Professional')

Box 7.6: (Multiple) SE Motivations and Improved QoL in the Retirement Life Stage - II

Catherine (63, 'Rationalising Professional')

Seeking an opportunity for both social and personal achievement, Catherine set up a time bank in her local community. Talking about her current life stage, she explained: *"it helps in that I'm retired and so I can do what I like. I've been constrained before..."*

However, although she knew she wanted to do something after retiring from her career job, she did not like the idea of volunteering without getting anything back. Catherine, therefore, provides an example for the 'why do something for nothing syndrome' which has been identified as a common barrier preventing people from doing voluntary work (Smith and Gay, 2005). As she explained further, she had been volunteering for a collective community abroad when she was 18, which had had a lasting influence on her value system, and it was important to her that her SE activity was based on the same idea of mutuality. Catherine explained as follows:

"What I'm doing now is I'm trying to recreate that kind of community where I live, where none of us are paying for anything that we do. [...] It fitted with my views of what people were capable of and what they could and should be doing that wasn't money driven... and could be for a higher ideal whatever... that sort of collective action was better".

Participants were shown to be using SE as an alternative to volunteering and 'mainstream' entrepreneurship. SE activity provided a unique combination of benefits related to both. However, whereas 'Volunteer Activist' motivations were more closely related to those often associated with volunteering, such as having a role or tackling social exclusion and loneliness (Smith and Gay, 2005; Wardell *et al.*, 2000), the motivational factors driving 'High Aspirers' were more often associated with those commonly linked with 'mainstream' entrepreneurship, such as independence and seeking a challenge (Walker and Webster, 2007). Nevertheless, given that almost half of the interviewees were 'Volunteer Activists', overall, participants' motivations were more closely related to volunteering than to 'mainstream' entrepreneurship.

Third, this study supports that SE can potentially play an important role in the context of 'downshifting', and provides evidence for the relevance of social theories of ageing, such as role and continuity theory, as discussed in relation to the concept of QoL in Chapter 4. The qualitative findings therefore provide additional evidence for the suggestion (made in Chapter 6) that SE plays an important role in OSEs' transition to retirement and that it can also lead to improving their QoL. Better QoL helps to promote 'healthy ageing' which in turn can enable and extend older people's longevity in SE activity.

The following sections will now demonstrate how these motivations feed into the SE process and discuss in more depth how the life course perspective contributes to a more comprehensive understanding of the opportunity recognition and development process.

7.4 Opportunity Recognition and Development – The Role of Motivations and Life Stages

Chapters 2 and 3 examined the current body of knowledge on the (S)E process. It was argued that opportunity recognition is a vital stage of the entrepreneurial process, but that whether or not genuine opportunities are recognised as such by the individual and subsequently exploited depends on the motivations of the entrepreneur (Carsrud and Brännback, 2011). Although agreeing with the vital importance of the motivations for the entrepreneurial process, another essential factor for setting off the opportunity development process is the life stage of the entrepreneur, as already demonstrated in the previous sections. As this study has revealed, if it is not ‘the right time’ in the entrepreneur’s life course, it is unlikely that an idea for a venture will be translated into practice, even if the individual is strongly motivated to do so.

As has been discussed in the literature review, opportunity development and motivations are still an under-researched field in (social) entrepreneurship (Yitshaki and Kropp, 2011). The current body of literature is mainly conceptual in nature and based on limited empirical evidence. In addition, much literature assumes that opportunity recognition and development occur within a narrow period of time (Cha and Bae, 2010). Furthermore, the role of ‘timing’ for the (social) entrepreneur (Lehner and Kansikas, 2012) in this context is still under-researched (Jones and Coviello, 2005). This section therefore draws on interview evidence to look at the relationship between opportunity recognition and exploitation through a life course lens and as a process which can sometimes take significant periods of time to unfold.

Drawing on in-depth interviews with the 21 social entrepreneurs over 50, this section makes a contribution to knowledge by developing a model (Figure 7.1) for studying motivations and the (social) entrepreneurship process from a life course perspective. The model brings together existing frameworks for studying opportunity development, motivations and the life course (discussed in Chapters 2 and 3) and extends these by adding the importance of life stages across the life course.

7.4.1 Entrepreneurial Alertness and the ‘Spark’

Chapter 2 discussed ‘alertness’ (Kirzner, 1973) or ‘entrepreneurial awareness’ (Ray and Cardozo, 1996) as a precondition for entrepreneurial opportunity recognition. As pointed out, there is no consensus on whether higher alertness increases the likelihood of an opportunity being recognised or whether the contrary is the case (Ardichvili *et al.*, 2003). The state of ‘alertness’ is not a special condition and entrepreneurship could hence, at least in theory, ‘happen’ to anyone, as Kirzner (1973) argued. People have ideas for ‘mainstream’ or ‘social’ entrepreneurial ventures all the time, be it during a dinner conversation or a walk in the park. Nevertheless, only a small percentage will start the journey of developing these ideas into an actual venture. This missing link between opportunity recognition and exploitation will now be examined in more detail.

The existing literature claims that heightened entrepreneurial awareness is created through interaction between personality characteristics and the environment of the entrepreneur (Ardichvili *et al.*, 2003), and therefore recognises the relationship between ‘structure and agency’. The previous sections have already discussed the influence of individual background and experience on people’s motivations to get involved in SE. As will be argued here, the state of heightened alertness is often triggered by particular experiences or events, pivotal moments or sharp breaks in the life of the entrepreneur. Examples of pivotal moments experienced by the participants of the study included sudden unemployment, surviving a severe illness, and loss of close friends and family members. Other triggers for higher entrepreneurial awareness included deep dissatisfaction with current circumstances (e.g. at work) or (an accumulation of) experiences in the local/cultural community (e.g. incidents of anti-social behaviour, racial discrimination). Table 7.7 presents a comprehensive overview of triggers to demonstrate the variety of such encounters and circumstances.

Table 7.7: Triggers and Life Stages

Type	Name	Trigger Moment	Life Stage	Decision: Suitable Life Stage?	Trigger Moment*/ Life Stage*
Volunteer Activist	Tom	Experience of discrimination due to lifestyle.	Unable to Work	Yes	
	Agnes	Experience of social exclusion of cultural/ethnic community and decrease of cultural practices.	Compatible with other responsibilities	Yes	
	Audrey	Experience of social exclusion of cultural/ethnic community in the UK	Move to the UK	Yes	
	Elizabeth	Experience of racial discrimination throughout the life course. Felt existing work on the subject did not tell the truth (was "too pretty pretty").	Retirement	Yes	
	Betty	Worked in related area and 'saw a lot of wasted youth'. Was dissatisfied with what she could do as part of her work and decided to set up own initiative.	Voluntary redundancy	Yes	
	Steve	Opportunity came up to use his voluntary sector and management experience to help his partner with her social venture.	Compatible with other responsibilities/no children	Yes	
	Phillip	The opportunity for his SE activities came up.	Compatible with other responsibilities	Yes	
	Lara	Realised need for project through work, but regulations did not allow her to put ideas into practice. Decided to set up own venture.	Early retirement	Yes	
	Patricia	Started volunteering when on maternity leave. Realised that this area of work was more meaningful and decided not to return to previous job. Sharp break in career – new job related to	Need to provide for family	No	Moving to a new city/leaving job
	Victoria	Had tried to run 'mainstream' business alongside main career, but failed. Other people told her that main reason was that she was not interested in making a profit.	Focus on main career	No	Death of husband/retirement
Rationalising Professional	Catherine	Inspiring volunteering experience during youth.	Focus on career, family	No	Retirement
	Tracey	Several incidents of antisocial behaviour in her local community reported in the media.	Compatible with part-time employment and children grown up	Yes	
	Adam	Sharp break in career before latest employment – new area of work same as area of SE activity.	Providing for family	No	Retirement
	Andrea	Illness led to sharp break in life - decision made to leave career job and do something more meaningful.	Left previous employment	Yes	
	Lisa	Was made redundant - own experience of lack of support for people over 50 to find employment.	Unemployment	Yes	
	Peter	Inspirational experience of making music together to communicate.	Compatible with other responsibilities	Yes	
	Paul	Opportunity came up at time of more sporadic employment.	Needs more stable income to provide for family	Yes	
High Aspirer	John	Mother worked in slums in Latin America, helping the poor – role model. Pivotal moments (loss of friends and own severe illness) made him think about life.	Providing for family	No	Children left house, no need to pay for them
	Jack	Wrote essay at university that "politicised" him. Decided to tackle poverty instead of pursuing a career in the field of his university studies.	New life stage after completing university studies	Yes	
	Bill	Spent long stretches of his childhood and youth in the developing world and decided to improve life of people there.	Providing for family	No	Last big project before stepping back
	Robert	Was born and raised in the developing world and his experiences there triggered his decision to help the people there one day.		No	Was looking for 'retirement project'

*As Trigger Moment and Life Stage, but taking place at a later point in time of the individual's life course.

Such experiences and pivotal moments trigger the states of higher alertness which are a necessary precondition for the ‘spark’ or idea (Corner and Ho 2010: 653), discussed in Chapter 3 as the moment which sets off the opportunity development process. According to Corner and Ho (2010: 643) opportunity development involves “growing and advancing an idea for social venture creation”. At the outset or the moment of the ‘spark’, these ideas may be more or less developed. As the data revealed, in line with the findings of Corner and Ho (2010), it could be a rough idea to ‘just do something’ with a particular social aim, or a clear idea for a social venture. For example, John (‘High Aspirer’) knew that he wanted to do something to tackle poverty in disadvantaged communities but had little idea as to how he would go about this. Andrea (‘Rationalising Professional’ – recruitment service for disadvantaged women), on the other hand, had a more specific plan of the type of venture required to address the particular needs of her target group. Even in cases where participants had a well formalised idea of what they wanted to do and how, translating the idea into the social venture tended to be a complex process, including experimentation and refinement, as well as phases of stagnation, depending on the context, and the means required and their availability in each individual case. For example, the cases provided in Boxes 7.7 and 7.8 illustrate how a change in economic climate can influence opportunity development.

Box 7.7: The Influence of Contextual Factors on Opportunity Development – I

Adam and Tracey (‘Rationalising Professionals’)

In both cases their business plans were reliant on generating an income from business clients in order to provide a free service with a social aim (recruitment service for professionals over 50; violence prevention training). However, both participants pointed out that the economic climate during the recession was making it difficult to sell their model. As Tracey explained, *“last year, we didn’t even try to market to businesses, because when the meltdown happened, all training schemes were closed”*. Nevertheless, despite cuts in grant and programme funding, she was confident that the focus of her venture had high potential to be funded:

Now is a good time because the issue of antisocial behaviour is very important, it’s got high profile, and also it sits in with the Big Society that the new coalition government is talking about; and also the co-production; the idea that you don’t just leave it all to the professionals, but that citizens have more of a role in it. It sits with that sort of thinking that’s developing now.

Tracey was right and, given that the social need addressed as well as her ‘business approach’ were in line with the government’s requirements; her venture’s income from grants trebled the following year and the overall income of the organisation (including income from trading increased by 70%).

However, Adam’s experience was less positive. In response to the difficulties mentioned above, the social venture subsequently changed its focus from recruitment to training. As Adam explained in the follow up interview, his experience in training provision allowed him to tap into his networks and develop the necessary co-operative links that would improve the probability of the venture qualifying for funding.

Box 7.8: The Influence of Contextual Factors on Opportunity Development – II

Robert ('High Aspirer')

Although planning to develop a fairtrade organisation that would eventually be financially self-sufficient, the business plan of Robert's social venture was dependent on a considerable amount of start-up funding. However, due to the economic climate, the organisations identified as potential funders had changed their emphases and no longer provided support to ventures with a non-UK focus. Consequently, Robert and his venture partners had to go through a process of several changes in strategy in order to substantially reduce costs: 1.) one of their founding partners, who was depending on drawing a salary from the venture had to leave; 2.) the second team partner agreed to invest £30,000 of his own money; 3.) the operational core of the organisation was moved from the UK to the developing world. Robert emphasised that, without these drastic measures, the venture would have collapsed.

In addition, in line with Corner and Ho's (2010) findings, this study found that the majority of cases did not reflect two main elements of opportunity development commonly presented in entrepreneurship literature: it was not always possible to 1.) neatly distinguish between an opportunity recognition and exploitation phase, and 2.) allocate cases to either the effectuation or rational/economic approach of opportunity development – opportunities were never solely created or discovered. The following section will examine the reasons for this. In addition, it will bring together existing models for studying opportunity development, motivations and the lifecourse discussed in Chapters 2 and 3 (particularly Corner and Cho, 2010; Jayawarna and Rouse, 2009; Jayawarna *et al.*, 2013; Shane *et al.*, 2003) and develop these further by adding the importance of life stages across the life course.

7.4.2 Changing Motivations and Life Stages

According to Carsrud and Brännback (2011:11), motivations have traditionally been studied in order to answer three types of questions: "what activates a person, what makes the individual choose one behaviour over another, and why do different people respond differently to the same motivational stimuli". As will be argued in this section, part of the answer to these questions can be found by examining 'the life stage' of the entrepreneur.

The role of 'time' in the context of opportunity development is still under-researched. In their codification and analysis of opportunity recognition relevant articles on SE, Lehner and Kansikas (2012: 39) identified 'timing' as a theme occurring in the literature. However, here consideration of time is limited to the importance of 'being at the right place at the right time' as an aspect of venture success. Hence, there is no discussion of the role of timing for the

(social) entrepreneur. Furthermore, whereas Corner and Ho (2010) have included time as an influencing factor in their model of opportunity development, they only explain briefly that in their case studies ideas took shape over time rather than emerging fully formed at the moment of the 'spark'. The role of 'time' in terms of being the right moment in the entrepreneur's life therefore remains under-researched. This section addresses this gap by looking at the relationship between opportunity recognition and exploitation through a life course lens.

The fact that the participants of this study were all over 50 helped to identify the importance of life stages across the life course, and how these had influenced their motivations to set up their current SE activity. As the data revealed, how motivations feed into the SE process depends on the nature of the motivation. In some cases, the influence of motivations within the process appeared very straight forward. For example, in Andrea's ('Rationalising Professional' – recruitment service for women) case (see Section 7.3.2), motivations were linked to her surviving a severe illness and deciding to spend the rest of her life doing something 'more meaningful'. Given that Andrea had not been motivated to do anything about her interest in women's issues before falling ill, it can be argued that it was her experience of surviving her illness together with a resulting gratefulness for being alive – a pivotal moment in her life – that triggered her motivations. In other cases, however, assessing the role of motivations in their SE process turned out to be somewhat more complicated; particularly in cases where participants appeared to have 'smoothly' transitioned into their SE activity. The reasons for this will now be elaborated on.

As the data revealed, the idea to create the social initiative was sometimes developed over a significant period of time in the participants' life course. In some cases the idea was born (opportunity recognition) in early adult life or even childhood (even if only as a very rough idea), but was only put into practice (opportunity exploitation) much later in life, with the idea evolving and taking a firmer form over time, or giving the individual many years to actively search for opportunities. Sometimes opportunity recognition and exploitation occurred during a narrower period of time, involving a more 'rational' and planned process; in other cases they were spread far apart across the life span. Overall, as Table 7.7 illustrates, one third of the participants had not turned their SE ideas into practice when first triggered, due to their decision that their life stage and circumstances were not conducive at that time.

For example, Adam had left his job in an organisation which supported older people in order to set up his own for-profit training company providing training to people over 50, as well as a

social venture aiming at supporting people over 50 to find employment. Looking at the strong relation between Adam's ('Rationalising Professional') previous employment and his current social venture, it would have been easy to assume that his SE activity had naturally emerged from his professional background. However, as the interview showed, the sharp break in career which had led to the current area of activity had taken place almost 20 years previously (see Box 7.5 in Section 7.3.3). The main reason for not setting up his social venture at that time – when his motivation was triggered by dissatisfaction with the area of work – was that it was not 'the right time' in his life, as the need to provide for his young family was still central. It is unlikely that the significance of this would have been uncovered without taking a life course approach to studying motivations.

Similarly, as mentioned in the context of the influence of the personal background (Section 7.2.1), in three of the four 'High Aspirer' cases, the motivations for setting up their current social ventures were rooted – or had been triggered – in their childhood or early adulthood. However, in three of these cases these motivations had always been in the background and only came back to the fore when the 'right' life stage provided the opportunity for finally achieving self-fulfilment by allowing the translation of the idea into practice. In any case, without taking into consideration the whole life course of these interviewees, it would falsely have been assumed that their motivation was primarily based on their professional background, given the strong relation to the nature of the SE activity, when in fact the social need tackled was essentially driven by their childhood motivations (Schoon and Duckworth, 2012).

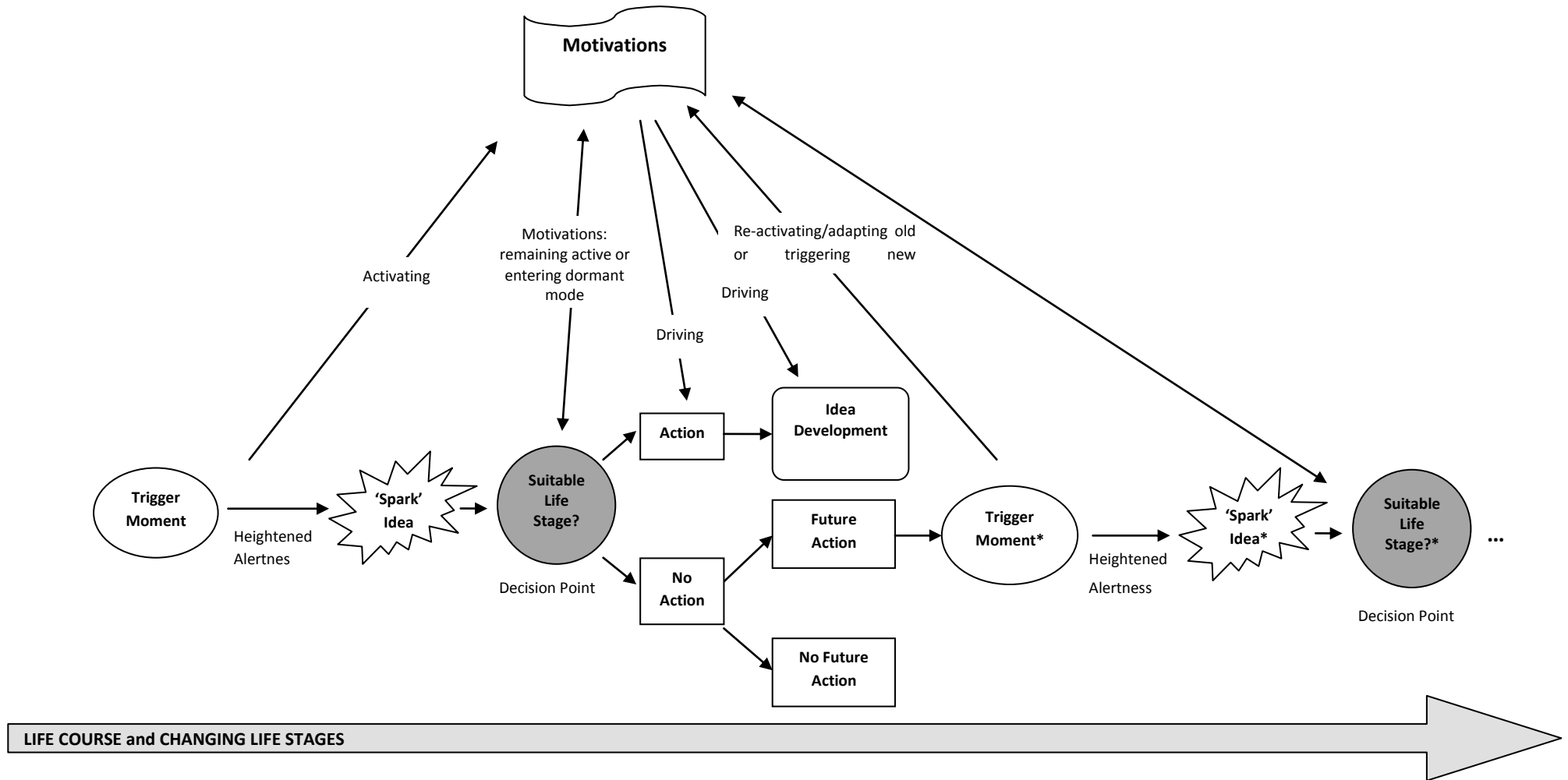
A focus on the relationship between opportunity recognition and exploitation through a life course lens also has conceptual implications for the differentiation between effectuation and rational/economic processes (Corner and Ho, 2010; Sarasvathy, 2001a and b) which were discussed as prevalent in entrepreneurship literature in Chapters 2 and 3. Even in cases which appeared to have followed a more rational/economic approach to opportunity development (e.g. in the cases of the 'High Aspirers' mentioned above), if seen through a life course lens, it could be argued that effectuation dominated the process, as participants had the opportunity to shape and develop their idea for a social venture over a long period of time. This insight is congruent with Corner and Ho's (2010) findings that the beginning and end of the opportunity development phase was not always clearly distinguishable, and that effectuation processes appear to dominate the (social) entrepreneurial opportunity development process. This study did not examine in detail how the participants developed their ideas for venture creation.

Studying this process in more depth therefore provides an important topic for further research.

Drawing on the findings presented in this section, a model of motivations and the SE process has been developed, which applies a life course perspective in order to better understand the decision process and role of timing for individuals' decisions to become involved in SE activity (see Figure 7.1). Box 7.9 provides an overview of the different elements, and John's ('High Aspirer') paradigmatic case in Box 7.10 exemplifies the model.

The insights offered by a life course perspective involve a focus on individual life history which is harder to apply to entrepreneurial teams. Although this study shows the importance of teams and networks in the context of (social) entrepreneurial activity (Chapter 6), it is not likely that a team goes through the whole opportunity recognition and development process collectively. Even if this is the case, the journey will be experienced and motivated differently by each team member, as it is strongly embedded in each individual's background and life course. For example, Robert ('High Aspirer'), who was running a web-based fair-trade organisation, only formed his team during the idea development phase (see Figure 7.1). As partly discussed in Section 6.4.5, all three team members had very different personal backgrounds, skills and experiences and took on complementary roles in the team.

Figure 7.: Model of Motivations and the Opportunity Recognition and Development Process from a Life Course Perspective



Box 7.9: Summary of Elements in the SE Motivations Model

Life Course:	The lives of individual agents in dynamic interaction with structures over time; i.e. throughout their lives, individuals make decisions within response to the changing opportunities and constraints faced, as well as influenced by their past experiences. Consists of a series of Life Stages .
Trigger Moment:	Desire to develop a social venture triggered by a catalytic life moment or experience. These included traumatic events, such as surviving a severe illness, bereavement, or 'inspirational moments', something they witnessed in their community or experienced through their work. These trigger events initiated the opportunity recognition and development process, leading to heightened alertness and activating the social entrepreneur's motivations for SE activity. The anticipation of a new life stage can also act as a trigger, but this is more likely to occur in the context of Trigger Moments* which take place at a later point in time in the same individual's life. They can re-activate the social entrepreneur's old motivations, adapt them to new circumstances, or activate new motivations.
'Spark' – Idea:	The spark sets off the idea development process. At the moment of the spark, these idea(s) could be more or less developed.
Life Stage:	Refers to the end or beginning of a phase in a particular sphere of an individual's life. In the SE process, it marks a decision making point. If it is not the right time for SE action in the life of the individual, s/he will not act and the motivations will enter dormant mode. A new Life Stage* later in this individual's life course may be more suitable and lead to SE activity. An important example of a new life stage in the context of this study is the beginning of retirement.
'Spark' – Idea*:	The social entrepreneur revives her/his original idea, adapts it if necessary to new circumstances, or formulates a completely new idea. Depending on the life stage, the social entrepreneur decides to act or not to act etc.
Motivations:	Motivations are influenced by the individual background of the social entrepreneur but only activated through trigger moments and experiences. Whether motivations remain active or switch to dormant mode depends on the life stage of the social entrepreneur. If the time is right for SE activity, the motivations drive action and idea development. In case of no action at the time, there is the possibility that trigger moments at a later point in the life course re-activate the old motivations or give rise to adapted or new motivations.

Box 7.10: Opportunity Recognition and Exploitation over the Life Course

John ('High Aspirer') was offering consultancy services for social enterprises and was working on setting up a large scale environmental social enterprise to tackle poverty in disadvantaged communities. The nature of the SE activity was strongly related to his professional experience and benefited from his extensive personal, social sector and professional networks.

Motivations:

Social need: to help the poorest in the country; Self-fulfilment: seeking the challenge to achieve the greatest possible impact for this social cause as "a bit of a last gasp"; Independence: has been self-employed for over 30 years; QoL: enjoyed maintaining status associated with self-employment; used SE as a form of downshifting, allowing a more flexible lifestyle and to return to study.

Trigger Moment:

The area of activity and motivations for engagement were based on an accumulation of events, rooted in the participant's childhood and youth.

I was brought up in South America where we have very very poor people. My mother [...] worked in the slums; she very much believed that we had to give these people dignity and opportunities for education and health and everything. So, I really got it from my mother.

In addition, the loss of his two best friends and surviving a severe illness himself as a young adult made him think about life.

'Spark' - Idea:

Based on these pivotal experiences in his life, it became clear for him that, one day, he would become an advocate "on behalf of the poorest in the country". At the time, he did not have a clear idea of the form in which this might be done.

Decision Point based on the Life Stage:

John did not act on his idea to set up a social venture to provide for the poor at this stage in his life, as the time did not seem right. His motivations entered dormant mode. Although he had been involved in volunteering for many years alongside his paid work, this type of activity had always been in the background and the need to provide for the family was seen as a priority.

Trigger Moment*:

The decision to devote more time to social objectives was triggered by a new life stage and made when the last child had left the house and become independent. His motivations were re-activated.

'Spark' - Idea*:

The fact that it was now the right time for action heightened his alertness. An old business partner offered him to buy his business from him and, adapting his old idea, John decided to turn it into an environmentally friendly social enterprise which provides services for the poorest of the country.

In conclusion, as this study revealed, the role of the personal and professional background on SE motivations is dynamic over the life course, and motivational factors have varied influences at different times in life (e.g. career breaks due to childcare responsibilities). Motivations therefore have to be seen in the context of a dynamic interplay between the social entrepreneur (agentic actions) and the wider context in which s/he is embedded (structure).

The findings also shed light on the intention-action link, as discussed in the context of value research on motivations (Chapters 2 and 3), and which has so far led to inconsistent findings. Whereas some values have been found to lead to predictable behaviour, others do not. As the findings of this project suggest, if the life stage is not conducive to SE action, ideas will either not be pursued at all or developed later in life at a more appropriate time for the social entrepreneur.

7.5 Motivations and Risk Perceptions

Another example of how SE motivations are shaped by the life course is provided by the influence of life stages on people's risk taking behaviour which has been discussed as important factor in the opportunity recognition and development process in Chapters 2 and 3.

7.5.1 Attitudes Towards Risk

According to Shane *et al.* (2003), entrepreneurial motivations are influenced by perceptions of risk and the opportunity structures which influence individuals' decisions. Financial risk taking propensity has been identified as a key difference between social and 'mainstream' entrepreneurs (Shaw and Carter, 2007). Authors such as Shaw and Carter (2007) have argued that social entrepreneurs are less likely than 'mainstream' entrepreneurs to risk personal finance in their ventures, but that they often experience significant personal risk of a non-financial nature, such as risking their local credibility or reputation, and networks.

This section examines the attitudes towards risk of the study participants and how these varied across the different types. It demonstrates how risk taking behaviour is influenced by the life course, and the consequences this has for people's decisions to become involved in SE at a particular time in their lives.

As discussed in Chapter 2, there is little consensus on whether (social) entrepreneurs are low, moderate or strong risk takers (Shane *et al.*, 2003; Smith *et al.*, 2012). In answer to the question ‘Do you see yourself as a risk taker?’, all 21 participants said that they did. However, there was a considerable variety in the way the interviewees described their risk taking propensity, including those who saw themselves as moderate, calculated and one who characterised himself as an ‘absolutely mad’ risk taker. In this context, Shane *et al.* (2003) warn that findings may be confounded with self-efficacy; i.e. individuals may objectively have a high propensity of risk, but do not perceive their behaviour as risky or *vice versa*. It therefore has to be pointed out that the evidence on attitudes towards risk presented in this section refers to participants’ *perceptions*, whereas risk taking behaviour refers to the researcher’s objectively formed view on the level of risk inherent in their actions.

Financial Risk

In line with Shaw and Carter’s (2007) findings, this study has identified that only a small proportion of the participants had risked personal finance in their ventures (three ‘Volunteer Activists’ and one ‘High Aspirer’), and none of them had used loan finance. Furthermore, two of the participants pointed out that they would be prepared to take risks with their own money, but they would not risk the project’s money. However, it also has to be recognised that all participants had devoted their personal time and effort or ‘sweat equity’ (Kim, 2011) to the social venture, which can be a considerable risk in itself, particularly if it coincides with forfeiting a salary, as in the cases of Patricia (‘Volunteer Activist’ – tackling harmful cultural/traditional practices) and Robert (‘High Aspirer’ - fairtrade), the latter of whom explicitly identified the financial risks related to his social venture:

People have said to me ‘why haven’t you put more of your own money into it’ and I have probably put about £22,000 of actual cash into it and also four years of my time. I personally would have put a bit more in but not a huge amount more and it is a subject of ongoing debate between myself and my wife [laughs] who says ‘come on, you have put enough in in terms of time and that has been costed in with equity’. You know, four years of my time you could argue is £200k if not more. (Robert ‘ – High Aspirer’)

All of the ‘High Aspirers’ presented themselves as strong financial risk takers, whereas the ‘Rationalising Professionals’ were more likely to describe themselves as moderate or calculated risk takers:

*Oh, totally... [I’m an] **absolutely mad** risk-taker. I’ve invested in the last... since 1998, in this sector, often unpaid, or when I’ve been paid it’s been paid at a very low rate.*

[...] And yet it's got to be, I think motivational, it's got to be part of who you are, your core values, driving it. (John – 'High Aspirer' – portfolio of SE activities)

*Well, I take risks, but they're very **calculated** risks. [...] So I am a risk taker, but I'm a sort of a **measured** risk taker, not a mad risk taker. There are areas where I'm confident in taking a risk, but I know I've covered the downside. I don't just take risks that could send me bankrupt, if you see what I mean. I'm not a mad risk taker. (Tracey – 'Rationalising Professional' – tackling antisocial behaviour in the community)*

The 'Volunteer Activists' expressed the most varied attitudes towards risk, ranging from those willing to accept strong financial risk to those not even bringing up financial risk in the interview (see other dimensions of risk for more detail). As Victoria ('Volunteer Activist'), who was helping a disadvantaged group in society to find employment, revealed, "I put in my life savings and eight years' work with no remuneration, and... I lost a lot". Another example for a strong financial risk taker amongst 'Volunteer Activists' is Patricia, who resigned from her job to start her social venture, sacrificing a salary of £45,000.

Other Dimensions of Risk

Although most of the interviewees talked about risk in financial terms, other dimensions of risk were also important. Furthermore, participants had very different conceptions of what 'risk taking' meant. For example, according to Lisa, "*risk taking is everything, business with social aim or for profit, [...] business is doing risk, everything is a risk, we leave our home in the morning, [...] life itself is a risk*". Other forms of risk mentioned by participants when talking about their SE activity, and their lives generally, were (in order of frequency) physical, professional, reputational, emotional and intellectual risks (see Table 7.8). These findings therefore reveal the holistic nature of risk and its various, often overlapping, dimensions which will now be discussed in more detail.

Table 7.8: Perceived Risk Dimensions in Relation to SE Activity and Beyond

<i>Risk Category</i>	<i>Volunteer Activist</i>	<i>Rationalising Professional</i>	<i>High Aspirer</i>	<i>Total</i>
Number of Cases (n=21)	10	7	4	21
Financial	5	4	4	13
Physical	6	3	2	11
Professional	4	2	3	9
Reputational	-	-	4	4
Emotional	2	1	1	6

Source: qualitative data

The 'Volunteer Activists' were most likely to perceive or experience physical risks in relation to their SE activity, and mentioned this type of risk more frequently than financial risks. These physical risks took various forms and were caused for different reasons. For example, in two cases involvement with the target group posed physical risks, as these individuals were prone to displaying aggressive behaviour. In five cases, physical risks existed due to the fact that participants' efforts to address a particular need were not well received by those negatively affected by their work and, in one case, even resulted in death threats (see Patricia's quote below).

All four 'High Aspirers' felt that they were facing strong reputational risks, and were the only type that mentioned this form of risk which was discussed in Chapter 3 in relation to the importance of credibility in networks (Shaw, 2004). Another emergent theme was related to professional risks which included the possibility of negative consequences at work for those running their social ventures part-time. For instance, Elizabeth's ('Volunteer Activist' – addressing racial discrimination) social entrepreneurial activity resulted in her being labelled as a 'trouble maker' at work, thus jeopardising her paid employment. Obvious professional risks also existed for those who were running their social ventures full-time and using them as a main source for their personal salary.

However, as the following example shows, these different types of risk were often closely related:

I think I have actually taken huge risks emotionally and to a degree with reputation with doing this because I still don't know even though we have got 50% of our funding whether in a month's time we will be taking off and I will have a great story to tell to all my friends or whether I will be saying to them the whole thing has collapsed. So that is the situation we face, living with that uncertainty is a kind of risk and being prepared to live with that over a very prolonged period of time I think is an emotional risk.
(Robert – 'High Aspirer' and strong risk taker – fair-trade organisation)

In line with other work on female risk taking, this study provides some evidence for women being more averse towards financial and other forms of risk than men (Walker and Webster, 2007; Brindley, 2005). One explanation could be that women often score lower in perceived feasibility or behavioural control, i.e. the belief that they are capable of undertaking the tasks required for their SE activity, as discussed in Chapter 2 (Davidsson, 1995).

Despite the above, it is notable that two female participants were clearly strong risk takers, having both taken major financial, reputational and physical risks. The nature of Patricia's ('Volunteer Activist' – addressing harmful cultural/traditional practices) social entrepreneurial

activity also led to her being subject to abuse and even death threats and, hence, experiencing considerable physical and emotional risks:

I have to say, it's not very easy, I get death threats... When I was in [name of town], I used to get death threats all the time, and staff and myself used to be on the police, um, risk list. In the end no one was beaten or knifed or anything, but still... the threat is there. If you feel the need to bring change, then you just have to keep going. (Patricia – 'Volunteer Activist')

7.5.2 Risk Taking Behaviour over the Life Course

As highlighted in Chapter 4, the popular assumption that older people are highly risk averse is often taken as one of the reasons why people over 50 are less likely to start their own business venture than younger people (Curran and Blackburn, 2001). However, research on this issue has not led to consistent results, and a study by NESTA (2009) found no evidence that 'third age' entrepreneurs are more risk averse than their younger counterparts.

In order to explore this question, the participants were asked whether their risk taking behaviour had changed over the duration of their lives. The responses suggest three categories of change with age: 1) those who had become 'more cautious'; 2) those who had 'not changed'; and 3) those who had adopted a 'nothing to lose' attitude. An overview of these categories is presented in Table 7.9 and Table 7.10 provides some examples of cases in which risk taking behaviour had either increased or gone down.

There were some differences between SE types in the sample regarding the nature and extent of the change in risk taking behaviour. In six out of the 21 cases, the participants stated that they were now risking more than in the past. Three of the four 'High Aspirers', who had identified themselves as being strong risk takers generally, belonged to this type. In four cases (two 'Volunteer Activists', one 'Rationalising Professional' and one 'High Aspirer') interviewees had become less willing over time to accept risk. In the remaining 11 cases, risk taking behaviour had remained stable over the course of interviewees' lives. As Table 7.9 shows, most 'Volunteer Activists' and the majority of 'Rationalising Professionals' were in this latter category.

Table 7.9: Risk Taking Behaviour over the Life Course - I

Has your tendency to take risk changed over time in your life?	Participant	Risk Taking Behaviour ⁵³	Type
'more cautious'	Steve	Moderate	Volunteer Activist
	Tom	Strong	
	Andrea	Moderate	Rationalising Professional
	Jack	Strong	High Aspirer
'not changed'	Phillip	Strong	Volunteer Activist
	Patricia		
	Elizabeth		
	Audrey		
	Lara	Moderate	Rationalising Professional
	Agnes		
	Betty		
	Lisa		
	Tracey		
	Peter		
'nothing to lose'	Victoria	Strong	Volunteer Activist
	Catherine	Moderate	Rationalising Professional
	Paul		
	Adam		
	John	Strong	High Aspirer
	Bill		
	Robert		

Source: qualitative data

The interviews also revealed how participants' risk taking propensity had been influenced by experiences in their life course. The following quotes illustrate the effect that personal background and experiences in childhood and later in life can have on an individual's attitude to risk:

Well, I mean, I have taken risks, like the [social worker] job working with the travellers, which some might think would be a big risk. My thing about risk is also from my upbringing, cause I said to you I was quite shy... So, that was how I was brought up. I think if I had been in a different environment, I probably would have taken a lot more risks. (Betty – 'voluntary activist' – social inclusion of people with learning disabilities)

I've always been a risk taker, mainly because I grew up with four boys. [...] I'm the youngest, you know, I was growing up with four boys, fighting, having to fight my corner and take risks. So, that's really... it has really helped to find my life and marrying a white man was also a risk, would it culturally work? (Patricia – 'voluntary activist' – addressing harmful cultural/traditional practices)

⁵³ These categories are based on the researcher's analysis of participants' risk taking behaviour and, rather than referring to a particular dimension of risk, aim to provide a more holistic understanding of the subject of risk. It is recognised that, whereas interviewees' perceptions of risk may be confounded by self-efficacy, this categorisation may be biased due to the researcher's risk perceptions and interpretation.

The interviews provided little evidence for changes in attitude towards risk being age related. As the following examples demonstrate, insofar as people's risk taking behaviour had changed to some extent over their life course, this was often related to the beginning or end of a life stage. The decision about the suitability of the life stage for SE activity therefore also involves reflection about inherent risk. For example, participants explained that, after getting married and having children they stopped taking risks that could have affected their family adversely. However, events like children leaving home and paid-off mortgages, or entering retirement allowed them to take bigger risks again, and were reflected in them developing what could be described as a 'nothing to lose' attitude:

But then obviously when I got married and had children and, you know, had a mortgage, that's when the stability of the civil service job was worthwhile. But as soon as I could, I left and went to college, and that was a big risk obviously, cause I was then embarking in my 40s on a new career and so on. (Adam – 'Rationalising Professional' – 50+ recruitment service)

In some cases, participants had changed their attitude towards a particular risk category. For example, two interviewees pointed out that while they had become more averse towards physical risk, their attitude towards other types of risk had remained unchanged. Similarly, Andrea ('Rationalising Professional' – recruitment service for women) explained that, whereas her attitude towards risk had not changed professionally, it had changed with respect to other elements of her life (see Table 7.10). She had fallen seriously ill at 50 and became involved in SE activity after recovering from her illness. The above mentioned change was affected by her decision to spend the rest of her life doing something 'more meaningful'.

Table 7.10: Risk Taking Behaviour over the Life Course - II

Has your tendency to take risk changed over time in your life?		Type*
'more cautious'	<i>I'm a more calculated risk taker... I've been burned on occasion by taking too many risks, but also it comes with experience. [...] When I'm doing projects now I think a lot more about what will be the outcomes, what will be the implications, who do I need to get on board at the beginning, how can I kind of reduce the overhead that will be required to pursue it. (Steve – creative teaching project)</i>	VA
	<i>I think I'm much more physically nervous in my old age. When I was young, I don't know whether we had bungee jumping then, or whatever it's called, but I'm sure I would've done it... whereas now you wouldn't catch me doing that in a million years. You know, I'm kind of 'oh my gosh', I'm gonna die soon anyway, I don't wanna do bungee jumping. So, I think the different kind of risks I would take have changed, but I think I've always been a risk-taker. (Andrea – recruitment service for disadvantaged group of women)</i>	RP
	<i>Oh, I would not choose again to have to go by cab everywhere [there was a time when Jack had to do this in order to get home safely, as the nature of his SE activity was not well received by everyone]. I had to very seriously talk to my partner about the fact that her life was potentially at risk as well. No, living in this area is enough of a risk. We had a machine gone going off the other night. (Jack – improving social cohesion in deprived areas)</i>	HA
'nothing to lose'	<i>It's more interesting to die in an interesting way, isn't it?! I mean, Bernard Shaw fell out of his apple tree at 92. You know, I can't even get on the bloody chair... (Victoria – work integration project)</i>	VA
	<i>I think as I've grown older my willingness to take risk has increased, because I think it's much more to do with the idea of everything to play for. I think it is the experience... OK, I don't know what's gonna happen, but give it a go. (Paul – inclusive arts project)</i>	RP
	<i>I'm willing to try things, if that's what you mean by risk taking, but I don't see what I've got to lose now... I'm going through what I want and speak in my mind wherever I am. I feel free now that I've retired not to have to be constrained by whatever my job title is and what I'm supposed to be doing, cause there's nothing I'm supposed to be doing... (Catherine – time bank)</i>	
	<i>Obviously, when I got married and had children and a mortgage, that's when the stability of my civil service job was worthwhile. But as soon as I could, I left and went to college, and that was a big risk obviously, because I was then embarking in my 40s on a new career. (Adam – 50+ recruitment service)</i>	HA
	<i>When we started [the organisation], a lot of people said there's no money in this... 'you're not going to be able to raise any money...' So, I paid off my house... I was lucky I could do so... So, at the age of 50, we closed our mortgage down, paid it off, because I could see that we might have to turn over on a very very small personal income for quite a while to come, so I needed to close down my expenses and so on and so forth. And my wife was supportive of that – the children had already left home, so it was feasible. (Bill – mental health organisation)</i>	

*Types: VA – Volunteer Activist; CP – Rationalising Professional; HA – High Aspirer

The following case provides an example which supports Shane *et al.*'s (2003) argument that individuals' risk taking propensity is confounded by self-efficacy, and also demonstrates that the ageing process can be a further influencing factor in this context. It therefore illustrates the complexity of the issue of risk. Victoria ('Volunteer Activist' – work integration project) often took considerable physical risks in her social entrepreneurial activity, but did not seem to be very concerned about this or even aware of the extent to which she was putting her personal safety at risk. In addition, she stated that she was getting increasingly concerned about her memory:

The other frustrating thing about age is not being able to remember people. I mean, people come up to me '[Victoria], how lovely to see you, you look great' and we're having a long conversation and I haven't a clue who they are. (Victoria)

It is questionable whether Victoria was aware of the additional risks that her loss of memory provided for her personal safety. However, in relation to her attitude towards risk, she had adopted the view that she had 'nothing to lose' (see Table 7.10).

As pointed out above, participants' willingness to take risks had increased in six cases. It has already been argued that this change in attitude to risk can partly be related to transitions from one life stage to another. The following example demonstrates how this increased tolerance of risk can also be influenced by participants' experiences and learning processes through their life course, as well as sometimes their use of and better access to specialist advice and support in relation to risk assessment:

I can assess [risk] better and I take more risk today than I did when I was in my 30s. [...] Cause in my 30s, as a social entrepreneur, let's use that phrase, because I was starting organisations then, I started one in 85 and so on, I was overconscious of other people's money. So, I thought 'oh my God, if I lose this money', you know, 'they've already supported my idea... now I'm going to lose their money as well', whereas now, I have a better way of understanding that. I have great financial staff, better than ever, I have much better financial managers today than I've ever had in my past. So, they are the ones who're risk averse, and so they provide this pressure and tension between me wanting to get out there, get the programme developed, let's get on with it, let's push and do it... and them having my respect and their responsibility for being risk conscious. So, the key really, the experience is putting structures into place that work... (Bill – 'High Aspirer' – mental health organisation)

Bill had set up nine organisations over his life and provides a good example for the argument that, as discussed in Chapter 2, "the perceived context (knowledge and situational characteristics) is a more important determinant of risk taking than personality" (Delmar, 2006: 162).

In conclusion, the examples presented above provide evidence for the diversity and complexity of risk taking behaviour and the problems it therefore provides for related research. The findings reveal the need to capture the holistic nature of risk and its various dimensions, including financial, reputational or other personal (e.g. physical) risks. Furthermore, they demonstrate that, in some cases, there is a discrepancy between participants' subjective perception of risk and their actual behaviour (Shane *et al.*, 2003).

In addition, the section has shown how risk taking behaviour was affected by changing circumstances in form of life stages. Even if participants considered themselves to be strong risk takers in general, they temporarily took less or lower risks during periods of family formation and child rearing. Furthermore, in response to the 'why now' question, in six cases the participants' life stage had led to an increase in risk taking behaviour which was reflected in them adopting more of a 'nothing to lose' attitude towards risk. In four cases the participants had become more cautious over time in their lives, in three of these the change in risk taking propensity only affected their physical risk taking behaviour and had occurred upon reflection on health or even life threatening experiences in their lives. These findings provide important insights into how considerations of risk feed into the SE process and how the decision regarding the suitability of the life stage for SE activity also involves reflections about inherent risk.

7.6 Conclusion – Motivations in the Context of the Life Course

This chapter has demonstrated how adopting a life course perspective has enabled the researcher to gain a better understanding of the (social) entrepreneurship process by focusing on how SE motivations and intentions evolve over time. It has extended existing knowledge on the SE process by combining new and existing research and theory in the fields of (social) entrepreneurship and social gerontology.

By examining the relationship between individuals' initial interest in SE activity, the idea for the actual venture and the opportunity to turn this idea into practice, the chapter has provided evidence for the complex and dynamic nature of motivations. As the interviews have shown, participants had multiple motivations which were often interrelated and overlapping, involving a combination of altruistic and egoistic factors, and embedded in their individual personal and professional backgrounds.

The most prevalent characteristic of participants' motivations for becoming involved in SE was the main focus on addressing social need, providing support for previous research that suggests that social entrepreneurs strongly emphasise values associated with social justice, equality and helpfulness (Stephan *et al.*, 2012). The chapter has also demonstrated how SE activity has provided participants with an alternative to 'mainstream' entrepreneurship and volunteering. However, whereas 'Volunteer Activist' motivations were more closely related to those often associated with volunteering, such as having a role or tackling social exclusion and loneliness, the motives driving 'High Aspirers' were more often associated with those commonly linked with 'mainstream' entrepreneurship, such as independence or seeking a challenge. Given that almost half of the interviewees were 'Volunteer Activists', overall, participants' motivations were more closely related to volunteering than to 'mainstream' entrepreneurship. The key additional benefit identified was that SE provided participants with the opportunity to shape their own venture to better reflect their individual skills sets, experiences and passions, while creating social value at the same time. In this context, it was shown how the area and nature of SE activity, as well as expectations regarding social and economic value creation, differed broadly between social entrepreneur types as discussed in Chapter 6.

Furthermore, examination of the relationship between opportunity recognition and exploitation identified the importance of life stages in the opportunity development process. Whether or not an idea for a (social) venture is turned into practice not only depends on the actors' motivations, but also on whether or not it is perceived by the individual to be the 'right time' in their life. This study therefore demonstrates the importance of life stages in the context of the intention-action link. In addition, although opportunity recognition and exploitation sometimes appeared to occur over a short period of time, the life course approach revealed that the idea for the project was sometimes not brought to fruition until many years after the event or experience that had triggered the opportunity development process. This finding provides further evidence for the predominance of effectuation within the SE process and, thereby the complex and dynamic nature of motivations. Based on these insights, a model of motivations and the SE process from a life course perspective has been developed (see Figure 7.1.).

In addition, by looking at the relationship between motivations and risk taking behaviour over the life course, this study found that, although participants' attitude remained relatively stable, their risk taking behaviour changed depending on the perceived suitability of the life stage.

However, the study has also provided evidence that individuals' attitudes to risk can change, for example in response to pivotal life experiences.

The importance of life stages for SE motivations was further demonstrated by exploring why the study participants had chosen to set up their venture at that particular time and not earlier, as well as the role the social venture played in their lives. In this context, the transition to retirement was identified as an important life stage influencing OSEs' SE motivations, with almost half (10/ 21) of the participants using their SE activity either as a transition or alternative to the retirement life stage. The study has provided considerable evidence for SE playing an important role in the context of 'downshifting' (as discussed in Chapter 4) whereby individuals choose to change aspects of their lives in order to improve their QoL. Consequently, whereas the last two chapters provided evidence for the important contributions of older people to SE, this chapter has also shown what they gain from social entrepreneurial activity themselves. Although this study provides limited evidence that OSEs are more likely to be concerned to address the issues of an ageing society (such as e.g. care needs, work/retirement transitions, social exclusion) than their younger counterparts, this chapter has also demonstrated how the SE activity of people over 50 helps address this issue by improving their own QoL.

8. Conclusion – Towards a Better Understanding of 50+ Social Entrepreneurs

8.1 Contribution to Knowledge

SE has been a matter of growing political and academic interest over the last decade. In the context of a political commitment to reduce the role of the state in the provision of public services, it has been suggested that it can serve to develop effective and efficient solutions to some of the most complex and pressing social issues. In the policy agenda of the current UK government social enterprises have been presented as capable of providing more personalised public services to disadvantaged groups, and innovating more quickly and effectively than state bodies (Conservatives, 2010).

Despite this high level of attention, SE remains ill-defined and under-researched. Attempts at theory-building on the SE process and the social entrepreneur mostly build on comparisons with ‘mainstream’ entrepreneurship and entrepreneurs, drawing on key elements of entrepreneurship theory, with little attention given to the varied characteristics and circumstances of the individuals involved. Furthermore, the rhetoric surrounding the potential of SE activity is to a large extent policy led and, given the lack of empirical evidence, based on assumptions. Since little empirical data is currently available on ‘who’ the social entrepreneurs are, the effectiveness of programmes and initiatives to support social entrepreneurs is often questionable, as they have been developed in an absence of detailed knowledge of the individuals targeted.

At the same time, demographic changes have fuelled a debate around the potential to increase the roles and levels of involvement of older people in the economy and society. In this context, the most important task is to minimise social and economic exclusion and to maximise the potential of this group. Nevertheless, the main policy response to the ageing population in the last ten years, called ‘active ageing’, appears to have achieved little apart from an increased expectation that older people should work longer (Walker and Maltby, 2012).

It is argued here that SE has potential to provide a form of transition from or an alternative to retirement, providing a ‘middle way’ between ‘mainstream’ entrepreneurship and voluntary work. As has been suggested, OSEs have potential to make an increased contribution to society (given their considerable experience), whilst, at the same time, enjoying a unique blend

of benefits through their civic engagement, while also tackling some of the issues associated with an ageing society. Hence, it has been argued that there is a need to ascertain more clearly who OSEs are, what they do and how they operate, in order to better understand their contributions to and expectations from SE, as well as their particular support needs.

This study has contributed to the field of SE in three main ways:

- 1.) A typology has been developed which reflects the spectrum of social entrepreneurial activity. This framework helps to deconstruct stereotypical notions of what a social entrepreneur is by demonstrating their diversity in terms of individual characteristics and how they operate. The typology emerged from the qualitative data and is supported by the quantitative data where relevant.
- 2.) Motivations, although having been identified as the key driver in the (social) entrepreneurial opportunity recognition and development process, are still an under-researched field in (social) entrepreneurship. By combining existing research and theory from the fields of (social) entrepreneurship and social gerontology (the sociology of ageing), this study demonstrates how motivations are shaped by the life course, and that the life stage of the social entrepreneur is another vital factor in the opportunity development process. Based on these insights, a model of the role of motivations in the SE process from a life course perspective has been presented.
- 3.) The study provides insight into how individuals' risk taking propensity can change over time and in relation to changing circumstances in form of life stages.

At the beginning of this thesis a number of research questions were set out to address the overall aims and objectives of this study. Each of these will now be discussed in the light of the empirical findings of this study. This will be followed by a discussion of the implications for theory-building, as well as policy making and support for SE. The last two sections will identify some limitations of the research and make suggestions for future research.

8.2 Empirical Findings

This study set out to obtain a better understanding of OSEs given the current dearth of empirical research on social entrepreneurs of this particular age group, as well as on the SE process more generally. However, the focus on people over 50 revealed the importance of the life course for better understanding SE motivations and activities, providing insights relevant to (social) entrepreneurship in general.

8.2.1 What is the Role and Potential of 50+ SE Activity?

Who are 50+ Social Entrepreneurs

In line with other research on the demographics of social entrepreneurs (Levie and Hart, 2011), the analysis of UnLtd's quantitative database identified OSEs as a diverse group in terms of gender and ethnicity. As in the case of their younger counterparts, women are more likely to become social than 'mainstream' entrepreneurs and people from a minority ethnic background are more strongly represented in SE than in the UK population. In addition, the study supports existing findings that degree level education is a strong predictor of SE activity.

The analysis also revealed important variations with respect to motivations and approaches to SE. Based on these insights, a typology of social entrepreneurs was developed to reflect the spectrum of social entrepreneurial activity. The three types which emerged from this study, namely 'Volunteer Activist', 'Rationalising Professional' and 'High Aspirer' show important differences with respect to their conceptions and expectations of SE. These were reflected in the ways in which they operated. Most notably, differences in motivations resulted in variations in the extent to which social/environmental objectives were accompanied by the aim to generate income through trading, whether a personal income was drawn from the SE activity, and, relatedly, the degree of formalisation involved, and the organisational form and structure adopted. Whereas 'Volunteer Activists' focus on small scale SE activities that are local in scope and often a form of 'self-help' to address social issues they are affected by themselves, 'High Aspirers' are characterised by larger scale ventures and, in half of the cases, international scope. The three empirically derived types have some similarities with those identified by Zahra *et al.* (2009). However, Zahra *et al.*'s theoretically derived typology would not have been an appropriate description of participants and their SE activities (see 6.2.2),

particularly since their rather extreme 'social engineer' type could not be identified amongst them. The 'social engineer' can be expected to be very rare, given that the 'High Aspirers' identified in this study already comprised the smallest group in the sample⁵⁴.

As the data revealed, although people over 50 are under-represented amongst social entrepreneurs, they are more likely to get involved in SE than in 'mainstream' entrepreneurship. Given that older people are strongly represented in volunteering (ONS, 2010b), this study supports the proposition, set out in Chapter 1, that SE activity can serve as an alternative to 'mainstream' entrepreneurship and volunteering. In addition, since almost half (10/21) of the participants were of the 'Volunteer Activist' type, this suggests that the nature of much 50+ SE activity is closer to volunteering than to 'mainstream' entrepreneurship. This finding implies that older people may be more likely to move to socially focused activities that help to improve their quality of life rather than to seek the challenge of combining social and economic objectives in a larger scale social enterprise. However, as the examples of 'High Aspirers' have shown, there are also expectations to this.

The different characteristics of each type, in terms of what they do and how they operate, will now be presented in some more detail (see also Appendix C for an overview).

What do they do and how do they operate?

Volunteer Activist

Individuals in this group tend to be focused on social needs that are specific to their local and/or cultural community which are under-addressed by both 'mainstream' welfare provision and other third sector organisations, such as larger charities. Another main characteristic identified was the cluster of minority ethnic women in this group, who were running initiatives to tackle issues faced by their own cultural communities. Most of the 'Volunteer Activists' were involved in their SE ventures on a part-time basis and their involvement was more sporadic than in the other types, although three were working on their social ventures full-time. The initiatives were small scale; either by choice or due to constraints such as lack of funding and/or the limited time available which they could devote to the activity.

⁵⁴ The only example for a 'social engineer' given by Zahra et al. (2009) is Muhammad Yunus who founded Grameen Bank and received the Nobel Peace Prize in 2006.

The only initiatives in this category, which operated as organisations with a legal form, were the three ventures on which the leaders worked on a full-time basis. Team leadership was least common amongst ‘Volunteer Activists’. They were least likely to have paid staff, but the majority of them made use of volunteers. Furthermore, they tended to draw on their personal networks (particularly local and/or cultural community) rather than their professional networks to get support for their initiatives. The ventures were mostly funded through small grants (such as UnLtd’s Level 1 funding⁵⁵), and only two had a small income for the organisation from trading. The ‘Volunteer Activists’ were also most likely to use personal finance, such as their pension, to fund the venture. None of them were drawing a personal salary from their SE activity, including those involved full-time.

This group had the most varied views on risk, ranging from cautious to some identifying themselves as strong financial risk takers, and also included those who did not even mention financial risk and perceived other forms of risk (such as e.g. physical or professional) to be more relevant in the context of their SE activity.

Rationalising Professionals

This group used SE more strategically either as a full-time job, or as transition or alternative to retirement. The participants in this group were mostly professionals whose SE activity was either strongly related to their professional background, or benefitted from transferable skills which they were able to apply to run the venture. In this category, there was considerable variety in the areas of activity, with only two of the seven cases addressing issues at the local community level, and the participants tending to have a less personal relationship to the social issues they were seeking to address. Their initiatives were either kept small by choice in order to be compatible with other commitments such as full-time employment, or they had aspirations to grow. As in the case of the ‘Volunteer Activists’, lack of funding and time limitations were the most frequently mentioned constraints.

All of the social ventures run by ‘Rationalising Professionals’ had chosen a third sector legal form, although some of them had only recently registered their organisation, and one was still in the registration process. Team leadership was slightly more common than amongst ‘Volunteer Activists’, and over half employed staff. In addition, the majority of them relied on contributions from volunteers. The majority had an income through trading and all of them

⁵⁵ Level 1 AWs participating in this study had received between £500 and £5,000 from UnLtd to assist with ‘turning their ideas into real projects’.

used grants to fund their venture. None of them were using personal finance to fund the initiative. The 'Rationalising Professionals' were the group most likely to draw a personal income from their SE activity, and in all full-time cases SE provided the main source of income. Most participants in this category identified themselves as moderate and very calculated risk takers.

High Aspirers

The participants in this group had the most strategic approach to SE, aiming to achieve the highest possible impact by addressing their social cause at a larger scale than in the other two categories. Half of them were operating internationally. These social entrepreneurs were 'all consumed' by their SE activity. Only one 'High Aspirer' was running his social venture part-time, in order for it to be compatible with his 'mainstream' venture which also included a social enterprise stream. Nevertheless, this group enjoyed the challenges and demands of leading a larger scale organisation.

As in the previous category, all of the social ventures run by 'High Aspirers' were operating under a third sector legal form. However, in one case the participant carried out one of his SE activities as a branch of his private sector business. Team leadership was most common in this group and the participants made extensive use of their professional and social networks in order to run and fund their organisations. All of them had paid staff, although the number of paid employees varied considerably between cases, and the majority made use of volunteers. In addition, all of these organisations had an income from trading, but only half of them used grants to fund the organisation. The use of personal finance to fund the social venture was not common, but half of the 'High Aspirers' were drawing a personal income from their SE activity.

All of the participants in this group were strong financial risk takers. Another interesting finding was that all 'High Aspirers' were the group most prone to feel a high level of reputational risk in relation to their SE activities.

Self Identity as OSEs

A key theme that emerged from the interviews was that the participants felt that they had a lifetime of experience to offer but that this was undervalued in today's society where

‘advanced age’ was more likely to be associated with the challenges rather than the opportunities it provides .

In addition, a key finding was the overall lack of identification on the part of participants with the language of SE. Although the majority of interviewees had received support from UnLtd as a charity that explicitly supports ‘social entrepreneurs’, only a few were comfortable to refer to themselves as such. Reasons for not using the term included uncertainty about its meaning, and concerns regarding their ability to live up to the ‘expectations’ of being a social entrepreneur.

Some resisted using the term because their interpretation of its meaning was not compatible with their mission or with what they expected from the project. For some the concept of ‘social **entrepreneurship**’ meant that the project needed to have an entrepreneurial, money-making aspect. For others ‘**social** entrepreneurship’ meant the contrary, and they were of the opinion that it would not be appropriate or that they did not need to generate an income through the project. These differences are also reflected in the typology presented.

Those who were using the terminology mainly did so to facilitate marketing the venture or to raise funds for it; only two participants were comfortable to describe themselves as a ‘social entrepreneur’ as it gave them an identity. This raises questions around the use of the term particularly by those looking to support OSEs. However, given the wide range of terms that participants used to refer to themselves and their SE activity, identifying a term that the majority of social entrepreneurs would identify with, clearly poses a challenge.

In any case, in answer to the questions around the apparent under-representation of OSEs set out at the beginning of this thesis, the insight gained led to the argument that they are both ‘hidden’ and ‘missing’. The implications of this finding for policy making and support will be discussed in Section 8.3.2.

8.2.2 What motivates OSEs and how do their Motivations feed into the Social Entrepreneurship Process?

How and why do people over 50 become involved in SE?

This study has demonstrated the complexity of SE motivations, and has shown how the motivations of OSEs are shaped by their life courses. It has shown how SE activity emerged from participants' individual personal and professional backgrounds, as well as how routes into SE activity varied considerably, with crucial events occurring at different points in their lives. A significant precursor in many cases was prior experience in volunteering, serving as a route into SE activity.

As has been pointed out, without using a life course approach the results in this respect would have been misleading, as the idea to create the social initiative had often been developed over an extended period of time in participants' life courses. For instance, in one case the participant seemed to have smoothly transitioned into SE activity from his previous employment. However, the life history interview revealed that his SE motivations had been triggered almost 20 years previously and resulted in a sharp break in career at the time. The main reason for not setting up his social venture earlier was that it had not been the right time in his life. It is unlikely that this insight would have been discovered without adopting a life course perspective.

Another type related pattern that evolved was that in most cases both the personal and the professional background had shaped participants' SE activities in distinctive ways, although one of the two factors tended to play the determining role. Furthermore, the life course perspective also brought to light the importance that having been brought up in a particular political or economic context can have on people's value systems and conceptions of SE. Nevertheless, these societal influences have to be seen as dynamic and open to change, depending on the individual's life experiences.

In support of the findings reported in Chapter 6, the insight into participants' motivations provides further evidence for SE activity serving as an alternative to or a 'middle way' between 'mainstream' entrepreneurship and volunteering. SE was found to offer a unique combination of benefits often associated with both, such as an improved QoL in the case of volunteering, or greater independence and self-fulfilment as in 'mainstream' entrepreneurship, and other

benefits. The key additional benefit identified was that SE provided individuals with an opportunity to shape their own venture to reflect their individual skills set, experience and passions, while at the same time creating social value. However, the extent to which such additional benefits were experienced varied between types and depended on their conceptions and expectations of SE.

How are motivations related to age and life stages?

This study has contributed to understanding the role of life stages in the context of SE motivations, showing that retirement provides an important transition phase and life stage and strongly influences older people's SE motivations. In response to the question as to whether SE can serve as a form of transition or alternative to retirement, the study revealed that almost half (10/21) of the participants were using their SE activity in this way. The research also provides considerable evidence for 'downshifting' playing an important role in this context, whereby individuals choose to change aspects of their lives in order to improve their QoL.

Furthermore, the study provided interesting insights regarding the question of whether people become more risk averse with age. As the interviews revealed, in almost half of the cases participants' risk taking behaviour had changed over time in their lives, influenced by changing circumstances at different life stages. Only in a few cases had interviewees become more cautious over time. In almost one third of the cases the current life stage of the participants had led to them adopting a more relaxed or even 'nothing to lose' attitude towards risk, i.e. they had become more willing to take risks than when they were younger.

How do motivations and life stages feed into the SE process?

Previous work on the (S)E process has identified opportunity recognition as a vital stage, but that whether or not an identified opportunity gets exploited depends on the motivation (Carsrud and Brännback, 2011) and alertness (Corner and Ho, 2010) of the entrepreneur. Although supporting the importance of motivation as the driving force in the (social) entrepreneurship process, through adopting a life course approach this study has identified the life stage of the potential (social) entrepreneur as another essential factor. As has been demonstrated, if it is not the 'right time' in the individual's life span, it is unlikely that an idea

for a venture will be developed further and translated into practice, even if the individual is strongly motivated to do so. This finding also sheds some light on the missing intention-action link. For instance, it offers one explanation for why value sets which suggest the intention to act entrepreneurially may not necessarily lead to related behaviour.

Based on these insights, this study has developed a model of motivations and the opportunity recognition and development process from a life course perspective. The model combines different existing frameworks for studying the entrepreneurial opportunity development process, and further extends these by adding the life course lens (Figure 7.1 illustrates the model, and Box 7.9 provides a summary of the different elements of the model).

8.3 Implications for Theory and Practice

8.3.1 Contributions to Theory-Building

This study makes three main contributions to the field of (social) entrepreneurship. First, it has developed an empirically based typology of social entrepreneurs which reflects the range of their social entrepreneurial activities (see Appendix C for a detailed presentation). It demonstrates the diversity of (50+) social entrepreneurs in terms of their demographic characteristics, as well as their expectations, contributions, challenges and related support needs. In addition, the fact that the majority of participants could be allocated to the 'Volunteer Activist' or 'extraordinarily ordinary' social entrepreneur (Amin, 2009) category also helps to deconstruct the notion of the social entrepreneur as a 'heroic' individual and demonstrates the 'everydayness' (Steyaert and Katz, 2004) of social entrepreneurial activity.

Second, it has contributed a model of the role of motivations in the SE process from a life course perspective (see Figure 7.1). In this way, it has extended existing knowledge by bringing together new and existing research and theory in the area of (social) entrepreneurship and social gerontology.

As has been discussed, although the importance of motivations in the (social) entrepreneurship process has recently been re-discovered, it remains an under-researched field, characterised by a lack of empirical research (Carsrud and Brännback, 2011). This study has revealed how using a life course lens allows a better understanding of the (social)

entrepreneurship process through exploring how (social) entrepreneurship motivations are shaped by the life of the individual. Although participants' motivations were a vital ingredient in the opportunity recognition and development process, whether or not an idea for a venture was taken forward depended on the suitability of the particular time (or life stage) in the individual's life. This study therefore demonstrates the importance of life stages for better understanding the link between entrepreneurial intentions and actual behaviour.

Furthermore, the findings provide further evidence for the predominance of effectuation within the SE process and, thereby, the complex and dynamic nature of motivations.

Third, this research has presented valuable insights into the diversity and complexity of risk taking behaviour, and highlighted the need to capture the holistic nature of risk and its various dimensions, including financial, reputational or other personal (e.g. physical) risks. In addition, the findings have shown how risk taking behaviour was affected by changing circumstances in the form of life stages and that attitude towards risk can change following reflection on pivotal life experiences (e.g. such as survival of a severe illness).

8.3.2 Implications for Policy Making and Support

The findings of this study have a number of implications for policy and support practice. The research was conducted in parallel with related work carried out by UnLtd's own research team and has helped the charity to develop programmes tailored to the needs of social entrepreneurs over 50. The collaboration also resulted in a Research Findings Paper⁵⁶ which was launched in March 2012, which has provided UnLtd with evidence needed to disseminate their message about the potential of SE in later life to a range of stakeholders and to influence policy, as demonstrated by the following examples:

- UnLtd were asked by the government's Department for Work and Pensions' Redefining Retirement team to set up an Age Action Alliance working group on the social and economic contribution of older people;
- They were invited to speak at OECD conferences in France and Japan on new approaches to tackling needs of the ageing economy;

⁵⁶ Stumbitz, B., McDowall, H. & Gabriel, M. (2012). *Golden Opportunities – Social Entrepreneurs in an Ageing Society*. Research Findings Series, UnLtd Research.

- The research has enabled UnLtd to contribute to the development of a national citizenship service for older people.

UnLtd are currently looking at further actions and the development of new programmes to support OSEs.

One of the key insights gained from this study is the lack of identification on the part of most participants with the language and discourse of SE, which was largely related to a general wariness and lack of understanding of the terms ‘social entrepreneur’, ‘social enterprise’ and ‘social entrepreneurship’. The fact that only a few of the interviewees viewed themselves as social entrepreneurs has implications in terms of support and outreach. Although SE is a contested term encompassing a range of activities, there is a need to overcome the barriers posed by the terminology and ‘demystify’ the term SE while also making clear that it can take many different forms. This would help to 1.) encourage more people over 50 to become involved, and 2.) make those who are already actively involved in SE aware that there is an existing support infrastructure which they can potentially benefit from.

Furthermore, there is a need to raise awareness amongst people over 50 in general regarding the potential benefits of involvement in SE, e.g. as a transition or alternative to retirement, including the potential for it to generate an income, as well as having a positive influence on their QoL. This can be expected to be of increasing importance over the next few years, given increasing concerns about the security of pensions and of the growing numbers lacking adequate provision.

In terms of the diversity of the activities and individuals involved, there is a need to recognise that engagement in SE activity can be at different levels of engagement, depending on individual circumstances, time available, financial situation and so on. As one of the participants pointed out:

I think there's a huge opportunity in this country where we've got such a lot of older people who've done a number of different jobs and have got a lot of experience; I think there's huge opportunity for that expertise and experience to be developed in an on-going way [...] – not just on a voluntary basis, because not everybody can afford to give lots of voluntary time when they get older. Some people can, but... (John – ‘High Aspirer’)

The main challenge for researchers, policymakers and support organisations is therefore to take account of this diversity in the design, targeting and delivery of support. In order to facilitate this, there is a need to look at how the expectations of older people from SE differ to those from younger people.

This study shows that OSEs tend to adopt a philanthropic rather than economic model of SE, and that they are less interested in building a business through their social venture than their younger counterparts. However, as the examination of OSEs' use of language indicated, this may partly be due to their limited awareness of the opportunities that more formalised approaches to SE can provide, as well as limited knowledge of the support available. The main support need mentioned was lack of or limited access to grant funding. As pointed out, the 'Volunteer Activists' were least likely to have the experience or confidence to prepare funding applications. In addition, they were the group least likely to generate an income through trading. The combination of lack of funding and trading income posed severe risks for the sustainability of the SE ventures. Consequently, there is a need to raise awareness of the advantages of earned income, particularly for those who think it is not legitimate to make money through the venture, those who think they do not *need* to generate an income, as well as those who see it as incompatible with their personal values to do so. In addition, it will be necessary to provide easily accessible and non-intimidating support on how to enhance the sustainability of the social venture.

In the case of those OSEs who were generating a respectable turnover through their venture, the support needed by these 'High Aspirers' differs considerably to that required by the 'Volunteer Activists', and is more related to their growth aspirations. Hence, there is a need for sensitising to the specific needs of the different groups within the age group.

In conclusion, all the participants felt that they had an accumulated lifetime of experience to offer compared to when they were in early adulthood. However, despite the UK government's claims in respect to increasing civic engagement and the role of the voluntary, community and social enterprise sector in this, there are growing concerns around the extent to which some aspects of government policy may be undermining the voluntary sector and social economy (e.g. Macmillan, 2013; Sepulveda et al., 2013). The evidence presented in this thesis suggests that, whereas the recent government actions have opened up opportunities for those who were equipped to tailor their venture to meet the government's agenda, these opportunities are not equally available to every OSE, as discussed in the context of critical gerontology and intersectionality, as well as in relation to the nature of (quasi) markets involved. Rather than creating an 'enabling environment' for the huge range of ventures included in the voluntary, community and social enterprise sector, current policy emphases have led to contradictory tensions, reinforcing the prevalence of highly formalised 'ideal' type (Nicholls, 2010b) and growth-oriented social enterprises, while marginalising many small, local community initiatives

which are, according to its rhetoric, at the heart of the 'Big Society'. There therefore appears to be a clash between government rhetoric and reality with respect to the provision of support which suits the diverse needs of those who decide to become involved in social entrepreneurial activity. There is a need to recognise that civic engagement can take many different forms and include different levels of involvement, depending on individual circumstances. Taken the efforts of all these people together, they can have an important impact and make a considerable contribution to the economy and society.

8.4 Methodological Reflections and Limitations of the Study

As set out in Chapter 5, this piece of research consisted of a three-phase sequential mixed-methods study. The first phase involved of a qualitative examination of OSEs by collecting data through face-to-face in-depth interviews which provided rich insights into the different expectations, contributions and challenges faced by the participants. The validity of these emerging patterns was then tested in the second phase, drawing on a quantitative database and survey data. The third phase of qualitative interviews served as an opportunity for the researcher to clarify important aspects for the final interpretation and analysis of the study as a whole.

The research questions necessitated an emphasis on a qualitative approach with exploratory interviews. Although the limited generalisability of qualitative research is often seen as a principle weakness, the applicability of this concept to qualitative research is a matter of considerable debate (Bryman and Bell, 2003; Robson, 2002). In addition, a mixed methods design, including a longitudinal element in form of a second qualitative phase, a life history approach and triangulation were used to increase the validity and generalisability of the project (Tashakkori and Teddlie, 1998).

Nevertheless, this study does not claim universal generalisability in statistical terms, as the main intent was to gain an understanding of the complex and multi-faceted reality and experience of OSEs. It focused on achieving 'depth' rather than 'breadth' (Baxter *et al.*, 2001).

As has been pointed out, the findings in relation to SE motivations drew exclusively on the qualitative interview data, building on existing conceptual and empirical work on the (social) entrepreneurship process. However, the exploratory nature of this project has facilitated a

new theoretical synthesis, resulting in new insights, which can be tested using larger samples, or different groups of (social) entrepreneurs in future research.

Another aspect which has to be taken into consideration is the extent to which the results may have been biased due to the values, or special characteristics and expectations of the researcher. By the same token, the fact that the researcher was of a particular age, gender and ethnicity will have had an impact on the accounts given by the participants. This bias is reduced to some extent by providing information on the background and the motivations of the researcher as set out in Chapter 5 (Bryman and Bell, 2003).

Finally, given that very little was known specifically on OSEs at the outset of this project, a wide definition of those involved in SE was adopted, including individuals or informal groups of people who are running projects with social/environmental aims. Given the contested nature of the label 'social entrepreneur', this inclusive approach was chosen in order to capture those people who do not use the language of SE to refer to themselves and their work. This approach also allowed exploration of the proposition that older people are not only 'missing' from SE but also 'hidden', with the findings indicating that restrictive definitions of SE and their operationalisation within survey methods has led to an under-recording of OSEs in most empirical studies. At the same time, depending on the conception of SE used, other authors may not recognise some of the participants of this study as 'social entrepreneurs', since not all of them operated under an SE legal form or generated an income from trading. This is particularly true for the 'Volunteer Activists', who comprised almost half of the participants of this study.

8.5 Suggestions for Future Research

Given the focus of this study on social entrepreneurs of a particular age group, utilising a qualitative in-depth exploratory approach, the findings suggest a number of interesting opportunities for future research.

There is a need to test the typology and model of motivations over the life course against the experiences of younger social entrepreneurs, and possibly their 'mainstream' counterparts. This includes exploring the role of life stages in relation to the motivations in the case of younger age groups. As has been pointed out in Chapter 1, although research on ageing is

often associated with older people, the process of ageing relates to the whole life course and, hence, applies to people of all ages.

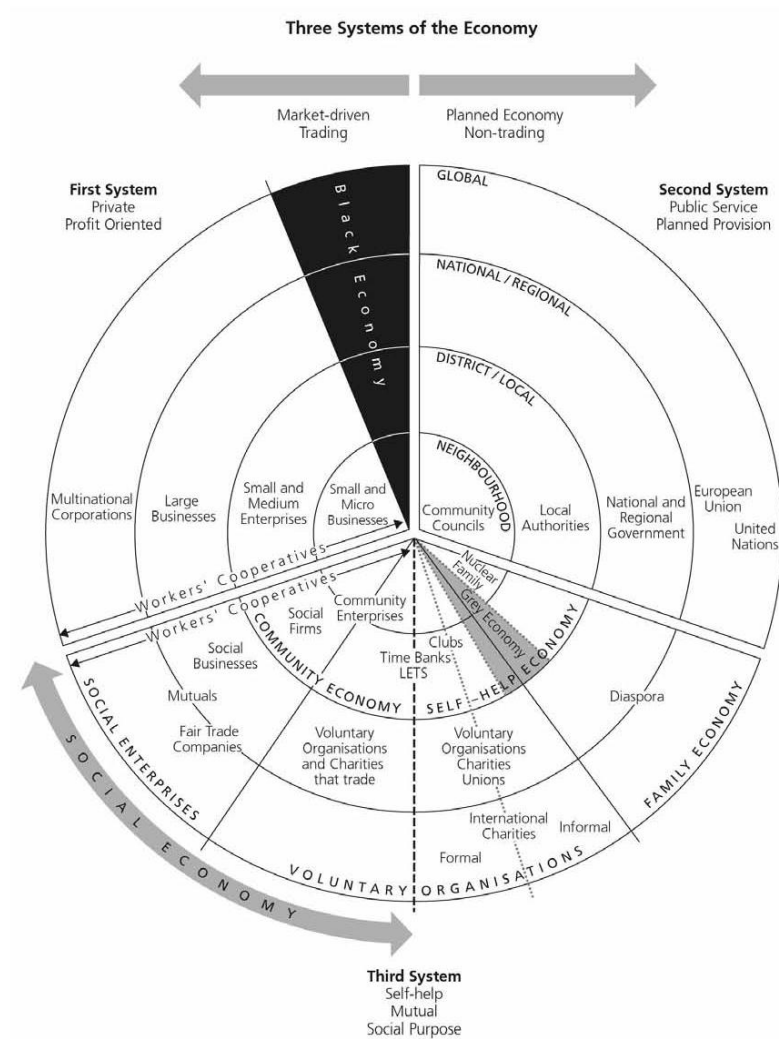
In addition, although the study confirms that the nature and extent of support needs depends on the circumstances in each individual case, it has provided a conceptual tool for understanding of three main categories, defined in term of their social entrepreneurial activity, motivations and support needs. Examining these both in more depth and at a larger scale, as well as to what extent they are age specific, indicates an important direction for future research.

Furthermore, the life course approach also provides a better understanding of the link between entrepreneurial intentions and actual behaviour, as well as further evidence for the predominance of effectuation within the SE process. An important topic for future investigation is to study *in detail* how ideas for venture creation are developed.

Given the policy interest in this topic, there is also a need for larger scale studies to confirm the benefits of SE as an important 'middle way' between 'mainstream' entrepreneurship and volunteering, as well as the potential of SE as a bridge or alternative to retirement.

Appendices

Appendix A – Pearce's 'Three Systems of the Economy'



Source: Pearce, J. (2003). *Social Enterprise in Anytown*. Calouste Gulbenkian Foundation: London.

Appendix B – Qualitative Interview Topic Guide

**Centre for Enterprise and Economic Development Research
Middlesex University
in collaboration with UnLtd**

Projects with Social Aims

Topic Guide

Name of interviewee:

Name of organisation:

Type of organisation:

Mode of interview (telephone or face-to-face):

Date:

Notes:

Introduction:

We are conducting a study on people over 50 who are running organisations with social and/or environmental goals. The study is part of a programme, funded by the Economic & Social Research Council and the Office of the Third Sector, and is conducted in collaboration with UnLtd.

The main topic areas that we would like to discuss with you are:

- The nature of your activity;
- The motivations that are driving your work;
- Your own background and experience, including challenges/barriers;
- Any recommendations you may have as to how you could better be supported in your work.

NOTE:

Stress absolute confidentiality of the interview – that interviewee/organisation will not be identified in any report or details forwarded to any other party without permission.

1. Details of the Organisation/Project and the Interviewee

1.1 Please could you tell me about what you currently do?

(identify if led alone or as part of a team; doing this part-time, full-time etc.)

1.2 Why did you choose to address this particular topic with your project?

1.3 Could you tell me about the history of the organisation/project and how you got involved?

(establish if involvement in SE started before or after 50)

2. Personal Background/Experience

2.1 Could you tell me briefly about what you did before you got involved in your current activity?

If not mentioned before, probe for:

- *experience prior to current activity (previous occupation and/or involvement with other organisations/projects; education)*
- *any particular skills or professional experience that was useful or important for starting the project?*
- *how has personal/professional background affected what doing now*
- *length of experience in SE*
- *other 3rd sector experience (volunteering)?*
- *if new to SE establish why this change (push or pull)*

3. Motivations and Role Activity Plays in Life

3.1 What have been your main personal and social motivations for starting up or getting involved in the organisation/project?

Reasons for starting own project rather than doing volunteering

3.2 Was there any reason for you starting this project at this point in your life?

If involvement in SE over 50, why not earlier in career?

What role does it play in life (hobby, central activity, alternative or transition to retirement, source of personal income – other benefits)?

How does activity fit in with other things you do alongside (work, social activities, family)?

- 3.3 Do you think your age has helped you in the context of your current activity? If so, how?**

4. Challenges/Barriers and Support Needs

- 4.1 Has your age been a challenge at any time in the context of your current activity? If yes, in what ways?**

e.g. discrimination; support aimed at other age groups etc.

- 4.2 What main challenges/barriers have you been facing? How have they been dealt with?**

Probe for: - difficulties at different stages (e.g. pre start-up, start-up, post start-up)

- nature of barriers (e.g. financial; regulations; discrimination; lack of support/advice from official or other sources etc.)

- is lack of time an issue?

- nature of support/advice sought (who from; when; useful or not; ease of access)

- 4.3 Do you think people over 50 have different support needs compared to younger age groups (different for 65+)?**

- 4.4 What could be done to better support you or people (over 50/65) involved in similar activities (or to attract more people)?**

Probe for: when was support most needed and not available
(e.g. pre start-up, start-up, post start-up)

- nature of support needed (financial etc.)

- suggestions for outreach

- 4.5 Given the trend of public sector service cuts and the government's plan to give more responsibility to communities to address social issues, how do you see your role in this context? (challenge or opportunity)**

5. Social Networks and Local Embeddedness

- 5.1 In your experience, how important has it been for the success of the project to 'know people' (in/outside organisations; family, friends etc)? Has the nature of your networks changed over time in your life?**

6. Nature of Activity and Risk

- 6.1 How would you call what you currently do?
- 6.2 Is it ever (un)helpful to identify with the term social entrepreneur?
When and why?
- 6.3 Do others sometimes label you as a social entrepreneur?
Showcard spectrum of activities – ask participant to place him/herself
- 6.4 Do you see yourself as a risk-taker? Has your tendency to take or
avoid risk changed over time in your life?

Ask only if UnLtd Award Winner:
- 6.5 How did you find out about UnLtd?

7. Plans for the Future

- 7.1 What do you expect to be the main challenges and opportunities
over the next year?
- 7.2 In five year's time, where do you think you and your
project/organisation will be?

Probe for: level of involvement, growth plans
- 7.2 What are your plans for retirement/stepping back from project?

*Probe for: planned retirement age; reasons for retirement at stated
age; plans for activities – some paid work; voluntary work; hobbies etc.*

8. Comments

- 8.1 Are there other issues which you think are important in the context
of this study which we haven't discussed?

Follow up Interview?

Finally, as part of this project, if there is anything else that I would like to ask you or that I would like to get clarification on. Would it be OK to contact you again?

9. Further Background Information of the Interviewee

9.1 Are you...

- a. Female
- b. Male
- c. Other _____

9.2 What is your age?

9.3 Do you have a disability?

- a. Yes
- b. No
- If 'Yes' please give details of your disability _____

9.4 What is the highest education level you have attained?

- a. NVQ (please tell us the level)
- b. CSE or GCSE
- c. A Levels
- d. Self taught
- e. Professional qualification
- f. Degree or postgraduate course
- g. Other _____

9.5 What is your Ethnicity

- a. Asian - British
- b. Black - British
- c. White - British
- d. Mixed - British
- e. Indian
- f. Pakistani
- g. Bangladeshi
- h. Chinese
- i. Black - African
- j. Black - Caribbean
- k. Black - Other
- l. White - African
- m. White - Other
- n. Arabic
- o. Mixed - Other
- p. Any other ethnic identity
- q. Unwilling to answer

Thank you very much for your help!

Appendix C – A Typology of Social Entrepreneurs

Type	'Volunteer Activist'	'Rationalising Professional'	'High Aspirer'	Total
	Social Entrepreneurship Social objectives with entrepreneurship	Balanced	Social Entrepreneurship Entrepreneurship with social objectives	
Number of Cases (n=21)	10	7	4	21
Who are they?	'Extraordinarily ordinary' ⁵⁷ social entrepreneurs – least likely to draw a personal salary from activity	Professionals who use SE more strategically than 'Volunteer Activists' - most likely to generate personal income	Professionals with a <i>highly strategic</i> approach to SE, mostly with previous experience of self-employment or employment in larger organisations	
Demographics				
Female	7	4	-	11
Male	3	3	4	10
Minority Ethnic	7	1	-	8
Degree Level Education	7	4	4	15
What do they do?	Address problems specific to the local or cultural community that are often neglected by the third and public sector	Strategically use their professional experience and transferable skills to benefit others	Address social issues at a larger scale, aiming to achieve considerable structural changes	
Role of SE activity in their lives	Very varied, but often form of self-help to address social problems they are affected by themselves	Either a full-time 'job' or transition/alternative to retirement	'All consumed' by activity but enjoying the challenge	
Participation				
Part-Time	7	4	1	12
Full-Time	3	3	3	9
Scope and Scale	Local/niche – Responding to needs of local community; small scale either by choice or due to constraints	Mostly local in scope; small by choice or with aspirations to grow	Local to international in scope; medium to larger scale and growth oriented	
How do they operate?				
Legal Form	Mostly unincorporated	Formal or in process of formalisation	Formal	
Venture Funding				
Trading	2	4	4	10
Grants	8	7	2	17
Personal Finance	3	-	1	3
Personal Income				
SE Activity	-	4	2	6
Other Employment	3	3	1	7
Pension	2	1	1	4
Other (e.g. benefits, partner's income)	4	-	-	4
Teams	2	2	2	6

⁵⁷ This term is based on Amin (2009): 'Extraordinarily Ordinary: Working in the Social Economy'.

Typology continued – SE Motivations of 50+ Social Entrepreneurs

Type	'Volunteer Activist'	'Rationalising Professional'	'High Aspirer'	Total
	<div> <div></div> <div>Social Entrepreneurship</div> <div>Social objectives with entrepreneurship</div> </div>	Balanced	<div> <div>Social Entrepreneurship</div> <div>Entrepreneurship with social objectives</div> </div>	
Number of Cases (n=21)	10	7	4	21
Key Motivations				
Social Need Relationship to the social need addressed	10 Mostly personal - often have personal experience of the issues involved	7 Mostly 'objective' – less directly affected and more informed by 'professional/rationalising' perspective	4 Not personally affected but often very personal/emotional relationship to the social need	21
Self-fulfilment	3 Achieved through independence and addressing problems very personal to them	4 Using their professional skills and experience to do something 'more meaningful' which benefits society	4 Achieving the greatest possible social impact through their venture	11
Independence	4 Aim to be achieved	4 Aim to be achieved	4 Status to be maintained	12
QoL	9 Achieved through having a role; often tackling own social exclusion and loneliness	6 Maintaining status whilst achieving independence and less pressurised lifestyle/downshifting	4 Maintaining status and continuous personal development; enjoy the challenges of busy lifestyle	19
Skills, Experience and Knowledge used for SE Activity	More likely to draw on <i>personal</i> knowledge, volunteering experience and skills associated with their cultural/ethnic heritage than on professional experience	Mostly drawing on professional experience or transferable skills	Drawing on professional background and experience and most likely to have previous experience of self-employment	
Motivations related to QoL				
Tackling social exclusion and loneliness	5	2	-	7
Having a role	3	1	-	6
Having status	1	4	4	6
Personal Development	2	1	3	6
Retirement, Downshifting/ Lifestyle	5	3	2	10
Attitude towards Financial Risk	Equally divided into moderate and strong risk takers	Moderate, very calculated risk takers	Strong risk takers	
Perceived Risk Dimensions (in relation to SE activity and beyond)				
Financial	5	4	4	13
Physical	6	3	2	11
Professional	4	2	3	9
Reputational	-	-	4	4
Emotional	2	1	1	6

Appendix D – Case Summaries

Volunteer Activists

Audrey (Female, 57, Black-African)

This participant had extensive experience in the voluntary sector and was running a cultural community centre at the weekends, to provide a meeting point for other people of the same ethnic origin and to raise awareness for the issues surrounding them. The interviewee had seen many family members dying and was strongly motivated by this experience to improve the rights of her people in the country of origin and the UK. Although this participant was highly educated and had many transferable skills, the interviewee was missing a network of influential contacts in the UK, was very constrained by the personal background, and had repeatedly been victim of discrimination. The project was small in scale and the interviewee in constant struggle to keep the initiative alive. The main challenge was perceived to be the lack of funding for the activity.

Betty (Female, 63, White-British)

Betty had a background in community work and teaching, and considerable experience of working with young people with mental health issues. Through her work she had gained a deep insight and understanding of the problems experienced by this vulnerable group of people, leading to her setting up her own project, aimed at helping these youngsters to maintain or improve their social skills and thus be better able to participate in social life. She was running the project together with two young people who had mental health issues themselves. The project was set up at a time of unemployment and the interviewee was involved in it part-time, as she was running a portfolio of activities. At the time of the interview, the project had been on hold, due to the time-consuming nature of the project and the lack of funding.

Elizabeth (Female, 71, Black-Caribbean)

This participant called herself an activist and was fighting for the rights of her people. She was running a portfolio of activities which were all motivated by her personal experience as a victim of racial discrimination and abuse. The interviewee had been actively engaged in related initiatives for many years, at work and privately, and being known as 'troublemaker' was causing her additional hardship. She used some transferable skills from her varied career background, but was missing influential networks. Her skills to apply for funding were limited and she stated that lack of funding was a main barrier. Nevertheless, she was strongly devoted to her mission and declared: "I will stay an activist till the day I die".

Lara (Female, 60s, Mixed-Other) and Steve (Male, 51, Mixed-Other)

This is an example of a team-led social enterprise and interviews were conducted with both team members. The project was initiated by one of the participants who had been frustrated in the day-job, perceiving the professional environment as very rigid and not leaving enough room for creativity. Consequently, the interviewee left employment and set up a social enterprise in order to have the freedom to follow a more creative approach which was felt to be vital for the success of the project. The participant, however, had no experience of self-employment, project management or fund-raising. This is where the second team member came in and, based on extensive experience in these areas, took over the management of the project, while the other participant focused on the creativity element, or the content of the project. Furthermore, in contrast to the first participant, the second team member was highly networked, which turned out to be another important advantage. In summary, the nature of the roles of both team members was vitally different. Neither of them would have had the skills and experience to run the project alone, but the combination of their efforts increased the potential of the social entrepreneurial activity to be developed into a more sustainable venture.

Patricia (Female, 56, Black-African)

This interviewee was running an organisation that aims to improve the health, social and economic position of BME, asylum seekers, migrants and vulnerable communities. The participant had got involved in this field of activity gradually, however, following a drastic

change in career. She had been working in the field of accounting and international marketing until she took a break when her child was born. The interviewee started volunteering for a few hours a week and realised that this type of work was more fulfilling than her previous occupation. Instead of returning to her old job, she studied Public Health and started working in the health sector where she got involved in working with vulnerable groups. She was running the project full-time, was highly networked and used the skills from her previous profession for the management of the organisation. Her own cultural background was seen as vital for being able to carry out this activity. The main challenge was seen in obtaining the necessary funding to be able to turn the project into a financially self-sustainable organisation long-term.

Phillip (Male, 55, White-British)

In this case, the participant had been involved in activities in the social economy for over 20 years. He had been working as community economy consultant, project manager and was holding two directorships on Boards of Trustees in social economy organisations. This interviewee was strongly devoted to the sector and motivated by, what he called, political ideology, rooted in a different era of collective and cooperative activity. In his opinion, the main challenges for the social economy could be seen in it becoming more individualistic, self-motivated and profit driven, as well as in the fact that people were taking over the lead who did not have the necessary knowledge of and experience in the sector.

Tom (Male, 53, Asian-British)

This participant was educated at degree level and had had a career in the media industry. The interviewee had led an excessive lifestyle and fell very ill as a result of it. He, hence, chose a 'more natural' lifestyle as a 'new age traveller', living in a trailer. It turned out that he had travelled a lot with his parents as a child and that he had lived in different countries. The new chosen lifestyle led to discrimination and social exclusion which triggered the participant's motivation for his social venture. Using the skills from his professional background (e.g. documentary), the interviewee set up a project that aims at showing the decency of the lifestyle as traveller and to fight against prejudices. At the same time, the lifestyle of the interviewee and, relatedly, very restricted access to resources, provided a major barrier to keeping the project alive.

Victoria (Female, 70, White-British)

This participant got involved in social entrepreneurial activity after retiring from paid employment when her husband died. She had no previous experience of volunteering, but had been working in a profession strongly related to the initiative. Victoria had tried to set up a mainstream business in her core career, but failed. After retiring she was no longer dependent on generating a personal income from an organisation, so she combined her personal and professional interests into a social enterprise that helps disadvantaged people back into employment.

Rationalising Professionals

Adam (Male, 64, White British)

Adam had decided to become self-employed after retiring from paid employment, aiming to achieve a better work-life balance, independence and also self-fulfilment. Using his professional background and experience, he set up two organisations of which one is a social venture. He developed the idea for the initiative together with a former colleague at work. The participant had developed the initiative out of a combination of value orientations shaped by his upbringing and previous employment. However, there was a sharp break in his career when he decided to leave his 'safe job' in his early forties, when his children were growing up, to start a course at university. He then started a new career building on his university education. At the time of the interview a main issue he was dealing with was that he felt that he was doing the majority of the work, while his partner continuously argued that she did not have more time to devote to the project as she was working full-time.

Agnes (Female, 54, Black-British)

This participant used to work as a secretary in her country of origin and had a long history in volunteering. When moving to the UK, she used her interest in helping people to develop a

career in the care profession. In her spare time, she set up a self-help project for a vulnerable group of women of the same cultural background to get together for social events, advice and training sessions, and to do traditional crafts. This interviewee combined transferable skills from her professional background for running the project with her cultural background/traditions for the area of activity. The main challenge was seen in the lack of funding.

Andrea (Female, 57, White-British)

This participant got involved in social entrepreneurial activity over 50 with no former experience of volunteering. The interviewee had abandoned a high-flying career after falling very ill and decided to spend the remaining lifetime on something more 'meaningful'. The participant set up a social enterprise which provides support for a disadvantaged group of women and is running the organisation full-time. The area of activity is not related to the former profession, but, as in the previous case, the participant draws on transferable skills and wide-ranging networks.

Catherine (Female, 63, White-British)

This participant was running two social ventures. The first one was set up over 20 years ago as an extension to her paid employment. The second initiative was set up as a retirement project, to give her something to do and interesting things to think about. Because of her pension, she did not need to raise a personal income from her SE activities. Catherine had been living in the same area for over 35 years and liked to concentrate her efforts locally by helping vulnerable people. Her interest in doing this type of work had been born when she volunteered abroad when she was 18. She liked the political ethos or the philosophy behind her work there and was trying to recreate the same community spirit through her project.

Lisa (Female, 54, Black-African)

This participant's background was in social work. She was made redundant aged 50 and saw how difficult it was to find work at that age. When she went to Jobcentre Plus for support, she found out that she did not qualify for the service as she was not on benefits. The participant

had been self-employed before and took this gap in provision to set up a social enterprise to provide her own employment service for people over 50. She had year-long experience in the voluntary sector and other related skills, and set up the necessary network of contacts needed while developing the project. Having mastered the challenge of developing a client base, the main remaining barrier was perceived to be the difficulty to obtain funding. However, as the follow-up interview revealed, she had subsequently been very successful in making links with important business partners which helped her to secure grant funding.

Paul (Male, 58, White-British)

Paul has had an interest in arts and performance as long as he can remember, and developed his career built on these interests. Transitioning from his previous initiative to this social venture can therefore be seen as natural progression. However, it was somebody else who had had the idea for this particular initiative and asked him whether he would like to set up the initiative with her. Paul was running the organisation full-time and it provided his main source of personal income.

Peter (Male, 57, White-British)

In this case, the interviewee had a background in fine art and art therapy and was leading an 'inclusive arts' project that facilitates disabled people, artists, and carers to make music together. The idea for setting up this initiative which provides workshops and bespoke equipment was born when the participant met a man with profound learning difficulties and built a relationship with him using music to communicate. The interviewee was running a portfolio of activities, and working towards a PhD in instrument design.

Tracey (Female, 60, White-British)

This interviewee was running an organisation that provides training to help people tackle challenging and antisocial behaviour in their communities. She was leading this project alongside her senior position in the health sector. The idea for the project came from an accumulation of several similar incidents reported in the media within a short period of time, where people were assaulted and eye witnesses either looked away or intervened and got

hurt. In addition, the participant decided to develop the project at that particular moment in time, as the last child had just left the family home, allowing the interviewee to devote the necessary time to the initiative. The participant was highly networked and had previous experience of setting up and running a (for profit) business, and stated that the success of the project was down to her networks as well as winning several grants. Nevertheless, the main challenge was seen in the ability to sell the training programme to businesses in order to secure the income necessary to become financially self-sustainable in the future.

High Aspirers

Bill (Male, 62, White other)

This participant had been involved in the sector for over 40 years. He set up his first charity when he was 29 and started 9 organisations over his life. In his most recently created venture, an internationally operating mental health organisation, Bill combined his interest in the developing world, where he spent large stretches of his life, with his expertise in the field of mental health and his experience in setting up and running organisations.

Jack (Male, 60, White-British)

This participant had been very actively involved in the social economy for almost 40 years. After leaving university with a degree in Biochemistry, he wanted to take some time off to do work for community service volunteers before working in the industry. However, based on this experience as a volunteer, he got intensively involved in developing the cooperatives movement and built up a career as project manager in a wide range of related initiatives. He never actually worked in Biochemistry. The interviewee had gone through extensive experience of setting up and running projects with a social aim, some of which had been very successful while others had failed, and was still leading a social enterprise that uses IT services as a means to improve social cohesion in deprived areas. Although having given up some of the cooperative ethos, as he had seen many cooperatives tearing themselves to pieces, he was

still motivated by the purposes of mutual benefit of doing something in a collective. In his view, the main challenges of the sector were of an ideological nature.

John (Male, 57, White-Other)

In this case, the interviewee was offering consultancy services for social enterprises and was working on setting up a social enterprise with a social and environmental aim. The area of the social entrepreneurial activity was strongly related to the participant's professional experience in self-employment and as director of a charity, and also benefited from the interviewee's extensive personal, social sector and professional networks. The motivation for engagement was deeply rooted in the participant's childhood. Although the interviewee had been involved in volunteering for many years, this activity had always been in the background and the need to provide for the family was seen as a priority. The decision to devote more time to third sector activity was made when the last child had left the house.

Robert (Male, 65, White-British)

This participant was educated at PhD level and had a background in organisational psychology. He had been looking for a retirement project, got inspired through a voluntary study that he got involved in, and set up a global social enterprise project in the field of fairtrade. Having been born and raised in the developing world, the interviewee felt it was time to 'give back' to his country of origin. The organisation was run by a virtual team of three who were based in different parts of the world and who were all taking on different roles in the venture. The interviewee was highly networked, had many transferable skills and knew how to fill gaps in knowledge. Major challenges were provided by the large scale of the project, to stay motivated as a team, the scarcity of time as a resource, and the aim to turn this big project into a financially self-sustainable business.

Appendix E – Statistical Test Results

Database of UnLtd Award Winners (n=5426)

		OSE (50+)	YSE (Under 50)	Chi-square Tests		
		(n=982)	(n=4444)	Value	df	Asymp. Sig. (2- sided)
Age		17.8%	82.2%			
OSE Decline 60+*** (Paired Samples Text)				28.487 (t)	5,423	.000 (2-tailed)
Gender (Continuity Correction ^b)	Female	52.5%	49.3%	3.008	1	.77
	Male	47.5%	50.7%			
Ethnicity*** (Continuity Correction ^b)	Minority ethnic	14.3%	26.1%	17.073	1	.000
	White	85.7%	73.9%			
Minority ethnic decline 60+***	Minority Ethnic 60+	7.8%		60.774 ^a	3	.000
	White 60+	92.2%				
Education***	CSE/GCSE/A-level	12.4%	19.7%	118.401 ^a	5	.000
	Degree/postgraduate	43.4%	51.8%			
	NVQ	4.2%	5.4%			
	Professional Qualification	23.0%	12.8%			
	Other (e.g. self-taught)	16.9%	10.3%			

Key: *p<0.05; **p<0.01; ***p<0.001

UnLtd Annual Survey 2012 (n=1014)

		OSE (50+)	YSE (Under 50)		Chi-square tests		
		(n=384)	(n=630)	N of valid cases	Value	df	Asymp. Sig. (2-sided)
Time spent on social venture each week	Less than 11 hours	26.7%	25.6%	796	.234 ^a	2	.889
	11 – 39 hours	51.8%	53.5%				
	40+ hours	21.5%	20.9%				
Geographical Scope	Locally	48.8%	44.6%	796	2.702	3	.440
	Regional	27.4%	31.2%				
	National	17.8%	16.4%				
	Other/don't know	5.9%	7.7%				
Plans for Scaling**		57.3%	65.5%	792	11.865 ^a	2	.003
Venture Income	Trading*	67.9%	68.4%	774	13.795 ^a	5	.017
Proportion of Social Venture Income	None	32.1%	31.6%				
	1% - 25%	29.7%	19.5%				
	26% - 50%	8.9%	9.4%				
	51% - 75%	7.8%	9.6%				
	76% - 100%	19.1%	25.8%				
	Don't know	2.4%	4.2%				
	Grants	64.4%	67.8%	779	8.102 ^a	5	.151
	Other (e.g. donations)	46.2%	35.5%	769	3.035 ^a	5	.695
Annual Turnover 2010-2011				547	2.450 ^a	7	.931
Proportion of own Personal Salary drawn from Social Venture**	None	56.3%	44.4%	797	15.494 ^a	5	.008
	1% - 25%	18.9%	24.6%				
	26% - 50%	7.0%	8.3%				
	51% - 75%	5.0%	3.2%				
	75% - 100%	11.3%	15.6%				
	Don't know	1.7%	3.8%				

Key: *p<0.05; **p<0.01; ***p<0.001

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